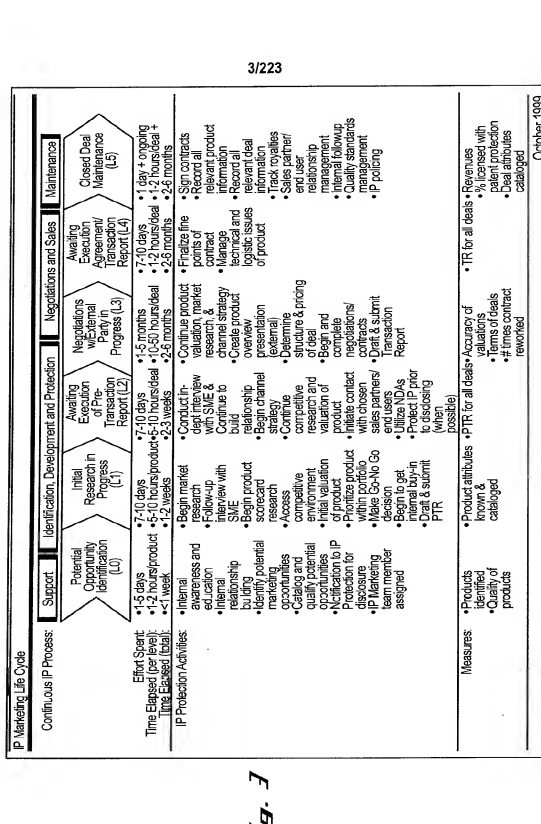
Continuous Intellectual Property Process
I. Identification, Development, Protection and Marketing:
Identification:
– Identify new intellectual property (inventions, technology, ideas, brands)
– Identify potential marketing opportunities
Development:
– Develop inventions, technology, ideas for IP protection
– Develop marketing sales channels
Protection:
– Protect IP with patents, copyrights, trade secrets, trademarks
– Protect with Non-Disclosure Agreements
Marketing:
– Market & competitive analysis
– Financial analysis
II. Negotiations and License/Sales:
IP Negotiations (e.g., with customers, government agencies)
License/Sales Initiation
– Contact vendors
– Contact end users
Contract development, negotiation and completion
III. Support and Maintenance:
Internal reward and recognition programs
IP protection and policing:
– Patent, trademark, copyright trade secret, portfolio management
– Policing IP
Relationship Management:
– Internal Entities
– External Sales Partnership and End Users
Royalty Management
Quality Standards Management
Identification Development, Protection and Marketing
Negotiations and License/Sales
Support and Maintenance
Intellectual Property
October 1999

Fig. 1

IP Protection Life Cycle
Continuous IP Process:
Support
Identification, Development and Protection
Negotiations and Sales
Maintenance
Innovation Identification (L0)
Innovation Development (L1)
IP Protection Initiation (L2)
IP Protection Pending (L3)
IP Registration (L4)
IP Maintenance (L5)
Effort Spent:
• 1-2 hours/product
• 1-2 hours
• 3-5 hours
• 1-2 hours
• 3-5 hours/patent
3-5 hours/trademark
1 hour/copyright
• 3-5 hours/patent
4-6 hours/trademark
1 hours/copyright
• 3-5hours/patent
1-2 hours/trademark
1 hours/copyright
• 1-2 hours
Time Elapsed (per level):
• 1-5 days
• 1-5 days
• 3-5 months/patent
1-5 days/trademark
1/5 days/copyright
• 18-24 months/patent
6-12 mos/trademark
2-3 months/copyright
• 1-5 days/patent
1-5 days/trademark
1-5 days/copyright
• 1 day + periodic
Time Elapsed (total):
• <1 week
• 1-2 weeks
• 4-6 months/patent
3 mos/trademark
3-4 weeks/copyright
• 22-3 months/patent
12-16 mos/trademark
4-6 months/copyright
• 2-2.5 years/patent
1-3.5 yrs/trademark
3-4 months/copyright
• 20 years/patent
5-10 years/trademark
10 years/copyright
Note: Trade secrets need not be registered, but reasonable steps must be taken to keep secret, including proper meetings and use of Non-Disclosure Agreements.
IP Protection Activities:
• Internal awareness and education
• Internal relationship building
• Identify IP protection opportunities
• Identify type of protection(s) needed
• Checklist and quality
• Notification to IP Marketing for Marketing
• IP Protection team member assigned
• Further educate inventor on generator on information needed for IP protection
• Assist innovation generator in drafting invention report
• Assist IP Marketing with technical understanding
• Disclosure form received
• Clearance Searches
• Assess disclosure
• Initial
• Notification to IP Protection legal
• Verify disclosure
• Follow up with innovation generator and legal
• Application filed
• Verify filing award received from agency
• Assist innovation generator with understanding of IP protection
• Follow up with legal regarding status
• Review written documents from agency/attorney where application filed & assist in response
• Assist in understanding of IP protection
• Assist innovation generator in understanding extent of IP protection
• Verify registration
• Verify issuance award received (if
• Record all relevant IP information
• Internal follow up
• IP policing
Measures:
• Innovations identified (#/type)
• Quality of innovations
• # Disclosures
• Innovation Attributes known and cataloged
• # Applications filed
• Quality of applications
• Proper innovation usage during IP
• Pendency
• # Registration
• Proper markings
• IP attributes cataloged
October 1999

Fig. 2

Fig. 3


IP Marketing Life Cycle
Continuous IP Process:
Support
Identification, Development and Protection
Negotiations and Sales
Maintenance
Potential Opportunity Identification (L0)
Initial Research in Progress (L1)
Awaiting Execution of Pre-Transaction Report (L2)
Negotiations w/External Party in Progress (L3)
Awaiting Execution Agreement/ Transaction Report (L4)
Closed Deal Maintenance (L5)
Effort Spent:
Time Elapsed (per level):
Time Elapsed (total):
•1-5 days
•1-2 hours/product
•<1 week
•7-10 days
•5-10 hours/product
•1-2 weeks
•7-10 days
•5-10 hours/deal
•2-3 weeks
•1-5 months
•10-50 hours/deal
•2-6 months
•7-10 days
•1-2 hours/deal
•2-6 months
•1 day + ongoing
•1-2 hours/deal +
•2-6 months
IP Protection Activities:
•Internal awareness and education
•Internal relationship building
•Identify potential marketing opportunities
•Catalog and qualify potential opportunities
•Notification to IP Protection for disclosure
•IP Marketing team member assigned
•Begin market research
•Follow-up interview with SME
•Begin product scope and research
•Access competitive environment
•Initial valuation of product
•Prioritize product within portfolio
•Make Go-No Go decision to get internal buy-in
•Draft & submit PTR
•Conduct in-dept interview with SME & Continue to build relationship
•Begin channel strategy
•Continue competitive research and valuation of product
•Initiate contact with chosen sales partners/ end users
•Initiate NDAs
•Protect IP prior to disclosing (when possible)
•Continue product valuation, market research, & channel strategy
•Create product overview presentation (external)
•Determine structure & pricing of deal
•Begin and complete negotiations/ contracts
•Draft & submit Transaction Report
•Finalize fine points of contract
•Manage technical and logistic issues of product
•Sign contracts
•Record all relevant product information
•Record all relevant deal information
•Track royalties
•Sales partner/ end user relationship management
•Internal followup
•Quality standards management
•IP policing
Measures:
•Products identified
•Quality of products
•Product attributes known & cataloged
•PTR for all deals
•Accuracy of valuations
•Terms of deals
•# times contract reworked
•TR for all deals
•Revenues
•% licensed with patent protection
•Deal attributes cataloged
October 1999

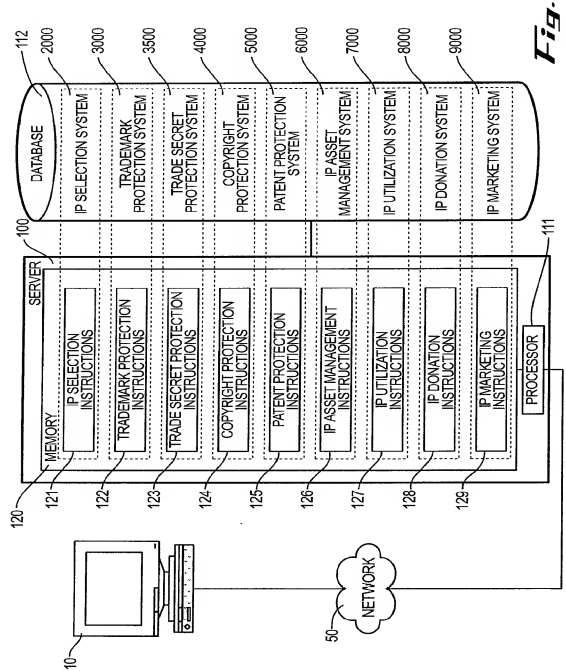

DATABASE
IP SELECTION SYSTEM
TRADEMARK PROTECTION SYSTEM
TRADE SECRET PROTECTION SYSTEM
COPYRIGHT PROTECTION SYSTEM
PATENT PROTECTION SYSTEM
IP ASSET MANAGEMENT SYSTEM
IP UTILIZATION SYSTEM
IP DONATION SYSTEM
IP MARKETING SYSTEM
112
2000
3000
3500
4000
5000
6000
7000
8000
9000
100
SERVER
MEMORY
IP SELECTION INSTRUCTIONS
TRADEMARK PROTECTION INSTRUCTIONS
TRADE SECRET PROTECTION INSTRUCTIONS
COPYRIGHT PROTECTION INSTRUCTIONS
PATENT PROTECTION INSTRUCTIONS
IP ASSET MANAGEMENT INSTRUCTIONS
IP UTILIZATION INSTRUCTIONS
IP DONATION INSTRUCTIONS
IP MARKETING INSTRUCTIONS
PROCESSOR
111
120
121
122
123
124
125
126
127
128
129
NETWORK
50
10

Fig. 4

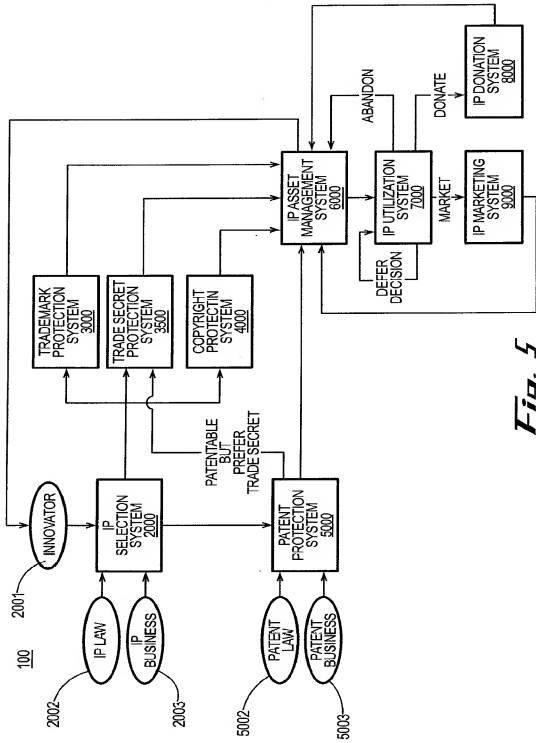

100
2001
INNOVATOR
2002
IP LAW
2003
IP BUSINESS
IP SELECTION SYSTEM 2000
PATENTABLE BUT PREFER TRADE SECRET
5002
PATENT LAW
5003
PATENT BUSINESS
PATENT PROTECTION SYSTEM 5000
TRADEMARK PROTECTION SYSTEM 3000
TRADE SECRET PROTECTION SYSTEM 3500
COPYRIGHT PROTECTION SYSTEM 4000
IP ASSET MANAGEMENT SYSTEM 6000
DEFER DECISION
ABANDON
IP UTILIZATION SYSTEM 7000
MARKET
DONATE
IP MARKETING SYSTEM 9000
IP DONATION SYSTEM 8000

Fig. 5

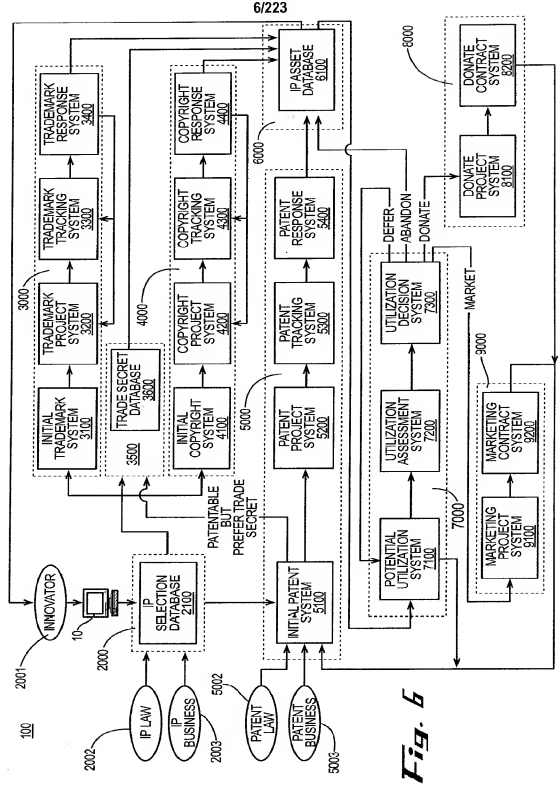

100
INNOVATOR
2001
10
2000
IP SELECTION DATABASE 2100
IP LAW
2002
IP BUSINESS
2003
INITIAL PATENT SYSTEM 5100
PATENT LAW
5002
PATENT BUSINESS
5003
PATENTABLE BUT PREFER TRADE SECRET
INITIAL TRADEMARK SYSTEM 3100
TRADEMARK PROJECT SYSTEM 3200
TRADEMARK TRACKING SYSTEM 3300
TRADEMARK RESPONSE SYSTEM 3400
3000
TRADE SECRET DATABASE 3500
INITIAL COPYRIGHT SYSTEM 4100
COPYRIGHT PROJECT SYSTEM 4200
COPYRIGHT TRACKING SYSTEM 4300
COPYRIGHT RESPONSE SYSTEM 4400
4000
PATENT PROJECT SYSTEM 5200
PATENT TRACKING SYSTEM 5300
PATENT RESPONSE SYSTEM 5400
5000
IP ASSET DATABASE 6100
6000
POTENTIAL UTILIZATION SYSTEM 7100
UTILIZATION ASSESSMENT SYSTEM 7200
UTILIZATION DECISION SYSTEM 7300
7000
DEFER
ABANDON
DONATE
MARKET
MARKETING PROJECT SYSTEM 9100
MARKETING CONTACT SYSTEM 9200
9000
DONATE PROJECT SYSTEM 8100
DONATE CONTRACT SYSTEM 8200
8000

Fig. 6

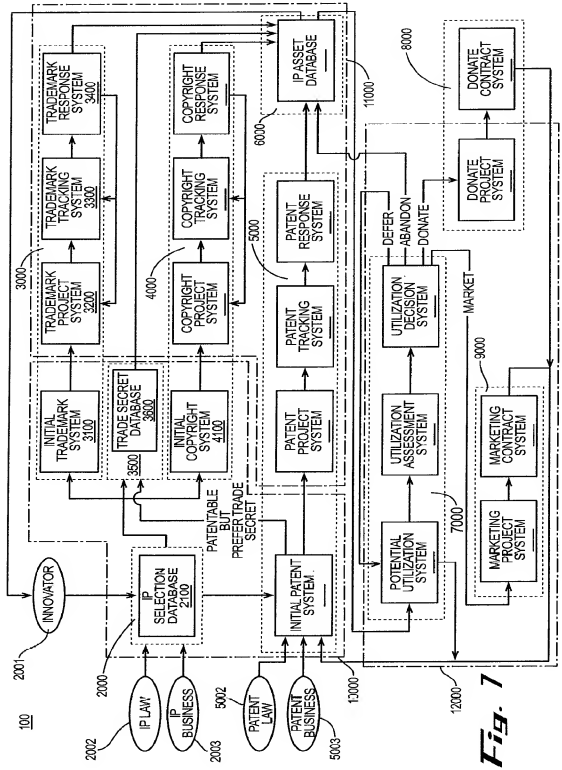

100
2001
INNOVATOR
2000
IP SELECTION DATABASE 2100
2002
IP LAW
2003
IP BUSINESS
5002
PATENT LAW
5003
PATENT BUSINESS
PATENTABLE BUT PREFER TRADE SECRET
INITIAL PATENT SYSTEM
12000
3000
INITIAL TRADEMARK SYSTEM 3100
TRADE SECRET DATABASE 3600
3500
TRADEMARK PROJECT SYSTEM 3200
TRADEMARK TRACKING SYSTEM 3300
TRADEMARK RESPONSE SYSTEM 3400
4000
INITIAL COPYRIGHT SYSTEM 4100
COPYRIGHT PROJECT SYSTEM
COPYRIGHT TRACKING SYSTEM
COPYRIGHT RESPONSE SYSTEM
5000
PATENT PROJECT SYSTEM
PATENT TRACKING SYSTEM
PATENT RESPONSE SYSTEM
6000
IP ASSET DATABASE
11000
7000
POTENTIAL UTILIZATION SYSTEM
UTILIZATION ASSESSMENT SYSTEM
UTILIZATION DECISION SYSTEM
DEFER
ABANDON
DONATE
MARKET
9000
MARKETING PROJECT SYSTEM
MARKETING CONTRACT SYSTEM
8000
DONATE PROJECT SYSTEM
DONATE CONTRACT SYSTEM

Fig. 1

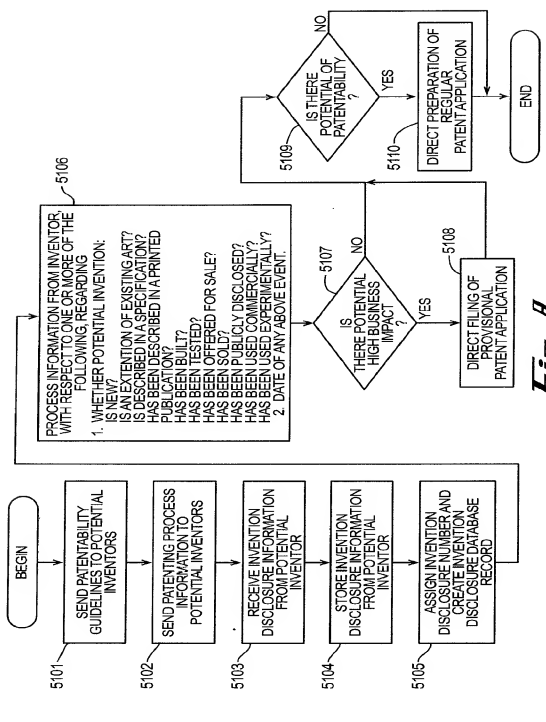
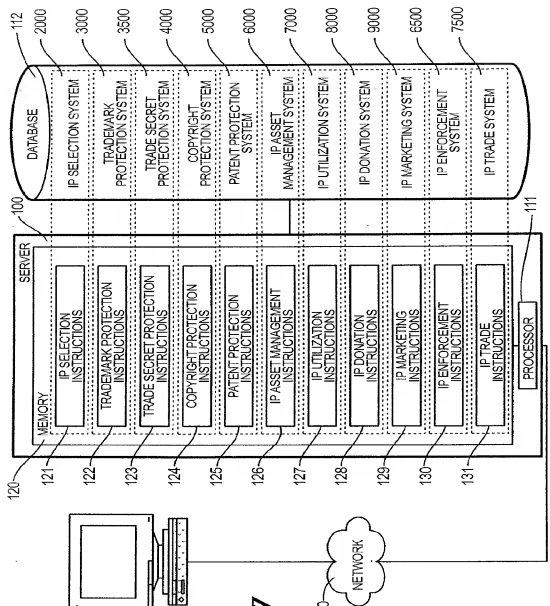

BEGIN
5101
SEND PATENTABILITY GUIDELINES TO POTENTIAL INVENTORS
5102
SEND PATENTING PROCESS INFORMATION TO POTENTIAL INVENTORS
5103
RECEIVE INVENTION DISCLOSURE INFORMATION FROM POTENTIAL INVENTOR
5104
STORE INVENTION DISCLOSURE INFORMATION FROM POTENTIAL INVENTOR
5105
ASSIGN INVENTION DISCLOSURE NUMBER AND CREATE INVENTION DISCLOSURE DATABASE RECORD
5106
PROCESS INFORMATION FROM INVENTOR WITH RESPECT TO ONE OR MORE OF THE FOLLOWING REGARDING
1. WHETHER POTENTIAL INVENTION:
IS NEW?
IS AN EXTENTION OF EXISTING ART?
IS DESCRIBED IN A SPECIFICATION?
HAS BEEN DESCRIBED IN A PRINTED PUBLICATION?
HAS BEEN BUILT?
HAS BEEN TESTED?
HAS BEEN OFFERED FOR SALE?
HAS BEEN SOLD?
HAS BEEN PUBLICLY DISCLOSED?
HAS BEEN USED COMMERCIALLY?
HAS BEEN USED EXPERIMENTALLY?
2. DATE OF ANY ABOVE EVENT.
5107
IS THERE POTENTIAL HIGH BUSINESS IMPACT ?
NO
YES
5108
DIRECT FILING OF PROVISIONAL PATENT APPLICATION
5109
IS THERE POTENTIAL OF PATENTABILITY ?
NO
YES
5110
DIRECT PREPARATION OF REGULAR PATENT APPLICATION
END

Fig. 8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SERVER
MEMORY
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PROCESSOR
111
121
IP SELECTION INSTRUCTIONS
122
TRADEMARK PROTECTION INSTRUCTIONS
123
TRADE SECRET PROTECTION INSTRUCTIONS
124
COPYRIGHT PROTECTION INSTRUCTIONS
125
PATENT PROTECTION INSTRUCTIONS
126
IP ASSET MANAGEMENT INSTRUCTIONS
127
IP UTILIZATION INSTRUCTIONS
128
IP DONATION INSTRUCTIONS
129
IP MARKETING INSTRUCTIONS
130
IP ENFORCEMENT INSTRUCTIONS
131
IP TRADE INSTRUCTIONS
112
DATABASE
2000
IP SELECTION SYSTEM
3000
TRADEMARK PROTECTION SYSTEM
3500
TRADE SECRET PROTECTION SYSTEM
4000
COPYRIGHT PROTECTION SYSTEM
5000
PATENT PROTECTION SYSTEM
6000
IP ASSET MANAGEMENT SYSTEM
7000
IP UTILIZATION SYSTEM
8000
IP DONATION SYSTEM
9000
IP MARKETING SYSTEM
6500
IP ENFORCEMENT SYSTEM
7500
IP TRADE SYSTEM

Fig. 9

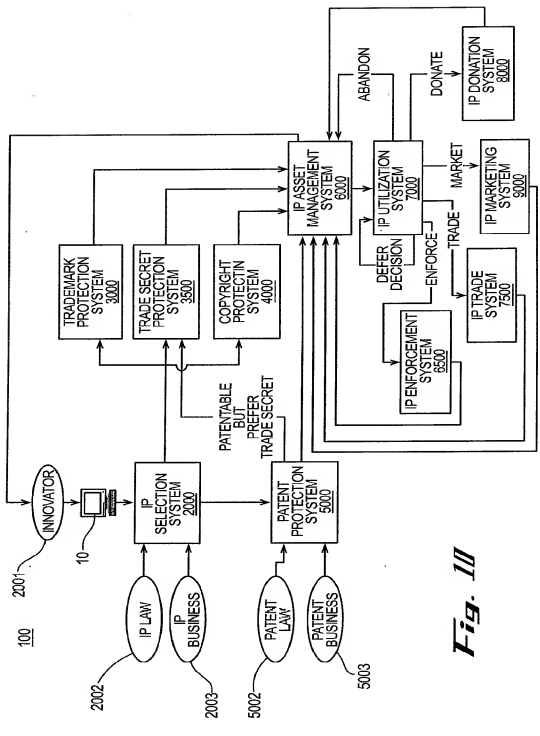

100
2001
INNOVATOR
10
IP SELECTION SYSTEM 2000
IP LAW
IP BUSINESS
2002
2003
PATENTABLE BUT PREFER TRADE SECRET
PATENT PROTECTION SYSTEM 5000
PATENT LAW
PATENT BUSINESS
5002
5003
TRADEMARK PROTECTION SYSTEM 3000
TRADE SECRET PROTECTION SYSTEM 3500
COPYRIGHT PROTECTIN SYSTEM 4000
IP ASSET MANAGEMENT SYSTEM 6000
ABANDON
DONATE
IP DONATION SYSTEM 8000
IP UTILIZATION SYSTEM 7000
DEFER DECISION
ENFORCE
TRADE
MARKET
IP MARKETING SYSTEM 9000
IP ENFORCEMENT SYSTEM 8500
IP TRADE SYSTEM 7500

Fig. 10

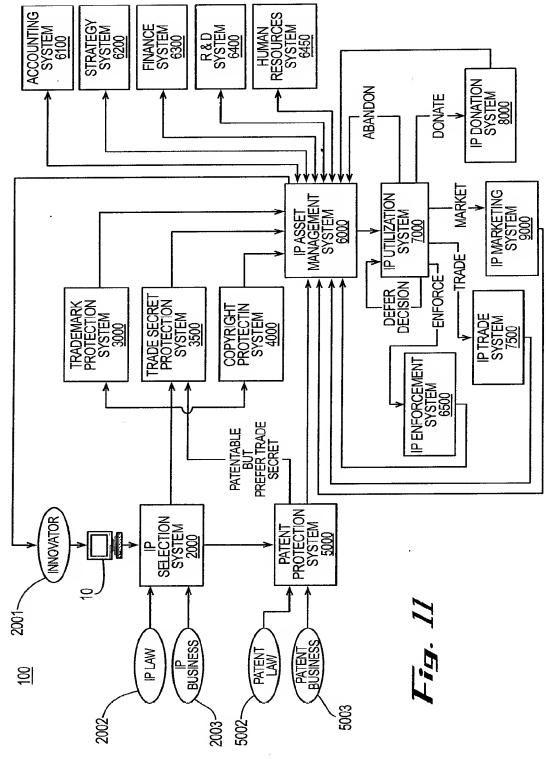

100
2001
INNOVATOR
10
IP SELECTION SYSTEM 2000
IP LAW
IP BUSINESS
2002
2003
PATENTABLE BUT PREFER TRADE SECRET
PATENT PROTECTION SYSTEM 5000
PATENT LAW
PATENT BUSINESS
5002
5003
TRADEMARK PROTECTION SYSTEM 3000
TRADE SECRET PROTECTION SYSTEM 3500
COPYRIGHT PROTECTIN SYSTEM 4000
IP ASSET MANAGEMENT SYSTEM 6000
ACCOUNTING SYSTEM 6100
STRATEGY SYSTEM 6200
FINANCE SYSTEM 6300
R&D SYSTEM 6400
HUMAN RESOURCES SYSTEM 6450
ABANDON
DONATE
IP DONATION SYSTEM 8000
IP UTILIZATION SYSTEM 7000
MARKET
IP MARKETING SYSTEM 9000
DEFER DECISION
ENFORCE
TRADE
IP ENFORCEMENT SYSTEM 6500
IP TRADE SYSTEM 7500

Fig. 11

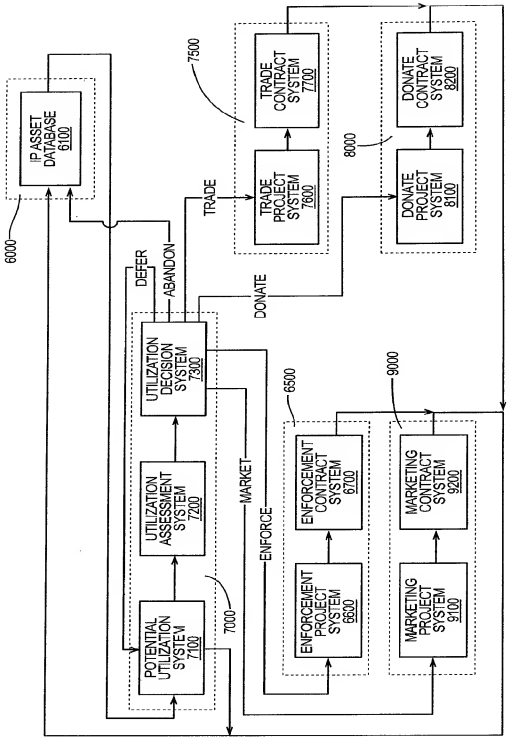

6000
IP ASSET DATABASE 6100
7500
TRADE CONTRACT SYSTEM 7700
TRADE PROJECT SYSTEM 7600
TRADE
8000
DONATE CONTRACT SYSTEM 8200
DONATE PROJECT SYSTEM 8100
DONATE
DEFER
ABANDON
UTILIZATION DECISION SYSTEM 7300
6500
9000
MARKET
ENFORCE
UTILIZATION ASSESSMENT SYSTEM 7200
ENFORCEMENT CONTRACT SYSTEM 6700
MARKETING CONTRACT SYSTEM 9200
POTENTIAL UTILIZATION SYSTEM 7100
7000
ENFORCEMENT PROJECT SYSTEM 6600
MARKETING PROJECT SYSTEM 9100

Fig. 12

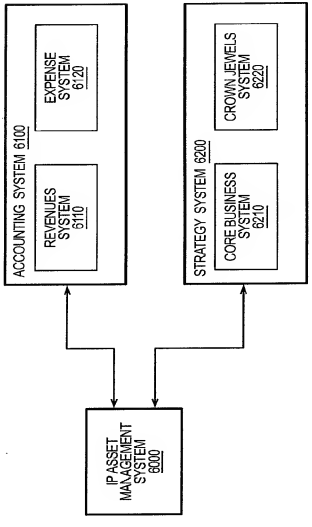

ACCOUNTING SYSTEM 6100
REVENUES SYSTEM 6110
EXPENSE SYSTEM 6120
STRATEGY SYSTEM 6200
CORE BUSINESS SYSTEM 6210
CROWN JEWELS SYSTEM 6220
IP ASSET MANAGEMENT SYSTEM 6000

Fig. 13

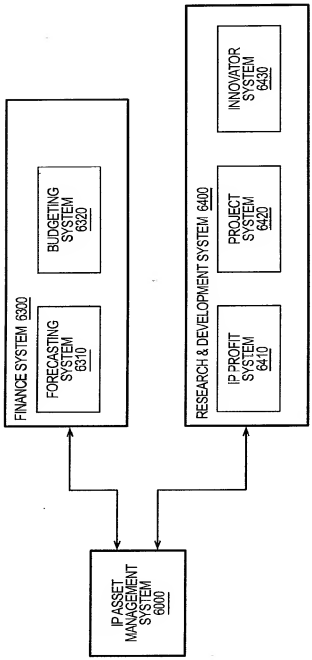

IP ASSET MANAGEMENT SYSTEM 6000
FINANCE SYSTEM 6300
FORECASTING SYSTEM 6310
BUDGETING SYSTEM 6320
RESEARCH & DEVELOPMENT SYSTEM 6400
IP PROFIT SYSTEM 6410
PROJECT SYSTEM 6420
INNOVATOR SYSTEM 6430

Fig. 14

	PRODUCT	BU	LEAD	L1	L2	L3	L4	L5	L6	L7	L8	L9	L10	GOAL	$	%
				INITIAL RESEARCH	MARKET RESEARCH	PTR APPROVAL	MARKET PLAN	SELL	NEGOTIATE	TR APPROVAL	EXECUTE CONTRACT	SETUP CONTRACT	AUDIT CONTRACT			
1	PROD A	BU B	X						42					2001	3.5M	0.5
2	PROD B	BU C	Z										45	4Q 00	1M	0.9
3	PROD C	BU A	Z				35							4Q 00	3.5M	0.25
4	PROD D	BU A	Y					35						4Q 00	3.5M+	0.5
5	PROD E	BU D	X					35						4Q 00	3.5M	0.5
6	PROD F	BU E	W					35								
7	PROD G	BU D	W		35											
8	PROD H	BU C	X					35						2001	500K	
9	PROD I	BU E	Z						35					2001		
10	PROD J	BU E	X					40						2001	5M	0.33
11	PROD K	BU B	W								47			2001	6M	0.9
12	PROD L	BU D	Y	31X										—	—	—
13	PROD M	BU B	Y					35								
14	PROD N	BU A	W				38							2001		
15	PROD O	BU C	Y	36X										—	—	—

Fig. 15

	PRODUCT	B/U	LEAD	L1	L2	L3	L4	L5	L6	L7	L8	L9	L10	GOAL	$	%
				INITIAL RESEARCH	MARKET RESEARCH	PTR APPROVAL	MARKET PLAN	SELL	NEGOTIATE	TR APPROVAL	EXECUTE CONTRACT	SETUP CONTRACT	AUDIT CONTRACT			
1	PROD F	BUE	W													
2	PROD G	BUD	W		35											
3	PROD K	BUB	W								47			2001	6M	0.9
4	PROD N	BUA	W				38							2001		
5	PROD A	BUB	X						42					2001	3.5M	0.5
6	PROD E	BUD	X					35						4Q 00	3.5M	0.05
7	PROD H	BUC	X					35						2001	500K	
8	PROD J	BUE	X					40						2001	5M	0.33
9	PROD D	BUA	Y					35						4Q 00	3.5M+	0.5
10	PROD L	BUD	Y	31X										—	—	—
11	PROD M	BUB	Y					35								
12	PROD O	BUC	Y	36X										—	—	—
13	PROD B	BUC	Z										45	4Q 00	1M	0.9
14	PROD C	BUA	Z				35							4Q 00	3.5M	0.25
15	PROD I	BUE	Z						35					2001		

Fig. 16

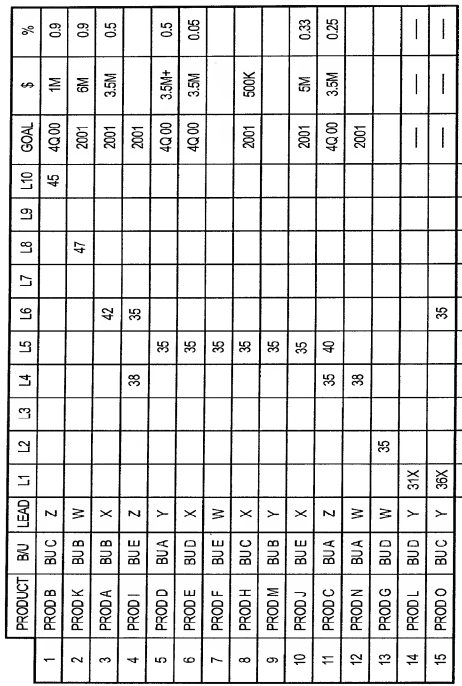
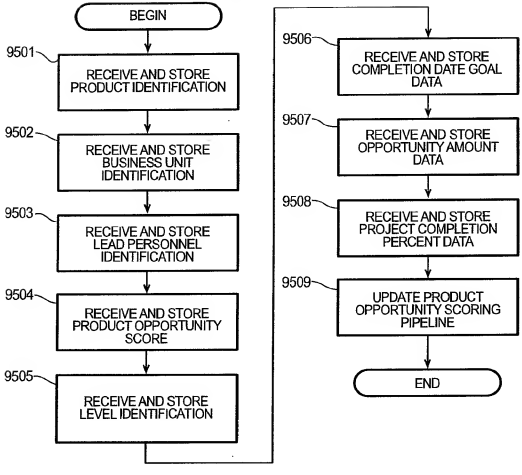

PRODUCT
BU
LEAD
L1
L2
L3
L4
L5
L6
L7
L8
L9
L10
GOAL
$
%
1 PROD B BU C Z 45 4Q 00 1M 0.9
2 PROD K BU B W 47 2001 6M 0.9
3 PROD A BU B X 42 2001 3.5M 0.5
4 PROD I BU E Z 38 35 2001
5 PROD D BU A Y 35 4Q 00 3.5M+ 0.5
6 PROD E BU D X 35 4Q 00 3.5M 0.05
7 PROD F BU E W 35 2001 500K
8 PROD H BU C X 35 2001 5M 0.33
9 PROD M BU B Y 35 4Q 00 3.5M 0.25
10 PROD J BU E X 35 2001
11 PROD C BU A Z 40 —
12 PROD N BU A W 35 38 —
13 PROD G BU D W 35 —
14 PROD L BU D Y 31X —
15 PROD O BU C Y 36X 35 —
INITIAL RESEARCH
MARKET RESEARCH
PTR APPROVAL
MARKET PLAN
SELL
NEGOTIATE
TR APPROVAL
EXECUTE CONTRACT
SETUP CONTRACT
AUDIT CONTRACT

Fig. 17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9501
RECEIVE AND STORE PRODUCT IDENTIFICATION
9502
RECEIVE AND STORE BUSINESS UNIT IDENTIFICATION
9503
RECEIVE AND STORE LEAD PERSONNEL IDENTIFICATION
9504
RECEIVE AND STORE PRODUCT OPPORTUNITY SCORE
9505
RECEIVE AND STORE LEVEL IDENTIFICATION
9506
RECEIVE AND STORE COMPLETION DATE GOAL DATA
9507
RECEIVE AND STORE OPPORTUNITY AMOUNT DATA
9508
RECEIVE AND STORE PROJECT COMPLETION PERCENT DATA
9509
UPDATE PRODUCT OPPORTUNITY SCORING PIPELINE
END

Fig. 18

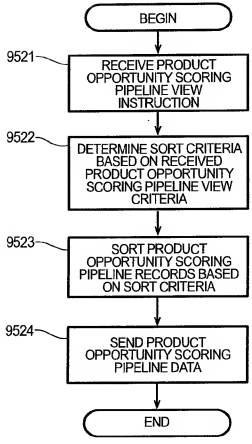
BEGIN
9521
RECEIVE PRODUCT OPPORTUNITY SCORING PIPELINE VIEW INSTRUCTION
9522
DETERMINE SORT CRITERIA BASED ON RECEIVED PRODUCT OPPORTUNITY SCORING PIPELINE VIEW CRITERIA
9523
SORT PRODUCT OPPORTUNITY SCORING PIPELINE RECORDS BASED ON SORT CRITERIA
9524
SEND PRODUCT OPPORTUNITY SCORING PIPELINE DATA
END

Fig. 19

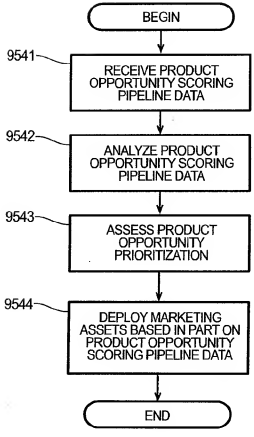
BEGIN
9541
RECEIVE PRODUCT OPPORTUNITY SCORING PIPELINE DATA
9542
ANALYZE PRODUCT OPPORTUNITY SCORING PIPELINE DATA
9543
ASSESS PRODUCT OPPORTUNITY PRIORITIZATION
9544
DEPLOY MARKETING ASSETS BASED IN PART ON PRODUCT OPPORTUNITY SCORING PIPELINE DATA
END

Fig. 20

Intellectual Property Development, Marketing and Maintenance Database System		
IP Marketing Database - Tables		
Table		**Description**
Companies		Table of companies
Marketing Opps		Table of IP marketing opportunties
IP Marketing Database - Companies Table		
Field Name	**Data Type**	**Description**
Formal Name	Text	Mailstop
IP Marketing Database - Marketing Opps Table		
Field Name	**Data Type**	**Description**
Opp #	AutoNumber	
Status	Text	
Estimated Mktg Date	Date/Time	
Product/Project Name	Text	
Product Group	Text	
Product Type	Text	
Type of IP Involved	Text	
BellSouth Entity	Text	
BellSouth Contacts	Memo	
BIPMAN Contact1	Text	
BIPMAN Contact2	Text	
BIPMAN Contact3	Text	
BIPMAN Contact4	Text	
Mktg Participant Name	Text	
Mktg Participant Address1	Text	
Mktg Participant Address 2	Text	
Mktg Participant City, State	Text	
Mktg Participant Contacts	Memo	
Mktg Participant Type	Text	
Deal Size	Text	
Estimated Deal Range	Text	
Estimated Deal Value	Text	
Priority	Text	
Description of Opportunity	Memo	
Background of Deal	Memo	
Financial Analysis	Memo	
Competitive Analysis	Memo	
Status of Deal	Memo	
Anticipated Timelines	Memo	
Pre-Trans Approval Person	Text	
Pre-Trans BellSouth Co	Text	
Title of Pre-Trans Approver	Text	
Date Pre-Trans Approved	Date/Time	
Final Bus Approval Person	Text	
Final Bus Approver's BellSouth	Text	
Title of Final Bus Approver	Text	
Data Final Bus Approved	Date/Time	
Final Legal Approval Person	Text	
Final legal Approver's BellSouth	Text	
Title of Legal Bus Approver	Text	

Fig. 21

Date Legal Bus Approved	Date/Time	
Follow-Up Date	Date/Time	
Follow-Up Needed	Memo	
Patent Status	Text	
IT Platform	Memo	
Level 1 Date	Date/Time	
Level 1 Date	Date/Time	
Level 1 Date	Date/Time	
Level 1 Date	Date/Time	
Level 1 Date	Date/Time	
Sub-entity	Text	
Top25	Yes/No	
IP Marketing Database - Queries		
Queries		**Description**
CoAlphaSort		
Level 0 WIP Report		
Level 1 WIP Report		
Level 2 WIP Report		
Level 3 WIP Report		
Level 4 WIP Report		
Level 5 WIP Report		
Marketing Opps Query		
Most Recent New Deals		
Opportunity Summaries - Specify 1 Entity Only		
Report by Entity-Specify 1 Entity Only		
Top 25 Report		
IP Marketing Database - Forms		
Forms		**Description**
Marketing Opps		
IP Marketing Database - Reports		
Reports		**Description**
Deal Overview by Vendor		
Level 0 WIP Report		
Level 1 WIP Report		
Level 2 WIP Report		
Level 3 WIP Report		
Level 4 WIP Report		
Level 5 WIP Report		
Most Recent New Deals		
Opportunity Summaries - All		
Opportunity Summaries - Specify 1 Entity Only		
Report by Entity - All		
Report by Entity - Specify 1 Entity Only		
Sales Funnel by Status		
Sales Funnel Tracking by Date		
Top Deals Report		

Fig. 22

Contract Tracking Database - Tables		
Tables		**Description**
Agreement Types		
Companies		
Contracts Listing		
Contract Tracking Database - Agreement Types Table		
Field Name	**Data Type**	**Description**
ID		
Agreement Types		
Description		
Contract Tracking Database - Agreement Types Table		
Field Name	**Data Type**	**Description**
ID		
Field1		
Contract Tracking Database - Contracts Listing Table		
Field Name	**Data Type**	**Description**
ID	AutoNumber	
First Party	Text	
Second Party	Text	
Third Party	Text	
Effective Date	Date/Time	
Termination or Renewal Date	Date/Time	
Termination/Renewal Terms	Memo	
Confidentiality Period?	Text	
Executed Copy on File?	Text	
Location of Original	Text	
Additional Comments	Memo	
Agreement Type	Text	
Executed Contract Image	Hyperlink	Link to scanned image of signed original agreement
Other Document Image	Hyperlink	Link to scanned image of signed original agreement
Transaction Report Image	Hyperlink	Link to scanned image of signed original agreement
Affiliate Involved	Text	
Transaction Type	Text	
Types of IP Involved	Text	
Frequency of payment	Text	
Payment/Royalty Due Date	Date/Time	
Additional Payment Terms	Text	
Amount Due	Text	
1999 YTD Payments	Currency	
2000 YTD Payments	Currency	
2001 YTD Payments	Currency	
2002 YTD Payments	Currency	
2003 YTD Payments	Currency	
IP Typo 1	Text	
IP Type 2	Text	
IP Type 3	Text	
IP Type 4	Text	
IP Type 5	Text	
Project Name	Text	
Contract Tracking Database - Queries		
Queries		**Description**

Fig. 23

Company Alpha Order		
Unexecuted Agreements		
Contract Tracking Database - Forms		
Forms		**Description**
Contracts Listing		
Contract Tracking Database - Reports		
Reports		**Description**
Unexecuted Agreements		

Fig. 24

Innovation Awards Database - Tables		
Tables		**Description**
Awards		
Company Addresses		
ESP Coordinators		
IP Coordinators		
Innovation Awards Database - Awards Table		
Field Name	**Data Type**	**Description**
Key #	AutoNumber	Unique Key
Award #	Text	Award ID#
LegalCaseNo	Text	Legal Dept. Case No
Greeting	Text	Mr., Ms., Dr. etc.
FullName	Text	Recipient's Full Name
CompanyName	Text	Company Name
BusAdr1	Text	Mailstop
BusAdr2	Text	Street Address
City	Text	City
State	Text	State
ZipCode	Text	Zip
Phone#	Text	Business Phone
FAX#	Text	Business FAX
IP ID#	Text	Name of IP Coordinator
SupvGreetings	Text	Mr., Ms., Dr. etc.
SupervisorName	Text	Supervisor's Name
SupvBusAdr1	Text	Supervisor's Mailstop
SupvBusAdr2	Text	Supervisor's Street Address
SupvCity	Text	Supervisor's City
CupvState	Text	Supervisor's State
SupvZipCode	Text	Supervisor's Zip
DHGreeting	Text	Mr., Ms., Dr. etc.
DeptHead	Text	Name of Department Head
DHBusAdr1	Text	Department Head Mailstop
DHBusAdr2	Text	Department Head Street Address
DGCity	Text	Department Head City
DHState	Text	Department Head State
DHZipCode	Text	Department Head Zip
Disclosure Received by Legal	Text	Date Disclosure Received by Legal
Disclosure Received by BIPMAN	Text	Date Disclosure Received by BIPMAN
Letter & Gift Sent to Inventor	Date/Time	Date Letter and Gift Sent to Inventor
Date Application Filed	Date/Time	Date Application Filed
Date BIPMAN Notified of Filing	Date/Time	Date BIPMAN Notified by Legal
Filing Award Request sent to IPC	Date/Time	Date Payment Request Sent to IP Coordinator
Filing Awd Payment Conf Rec'd	Date/Time	Confirmation of Payment to Inventors Rec'd
Filing Award Recognized at Luncheon	Date/Time	Date Award was Recognized at Inn. Awds. Banquet
Date Application Issued	Date/Time	Date Application Issued
US Patent Number	Text	US Patent Number
Date BIPMAN Notified of Filing	Date/Time	Date BIPMAN Notified by Legal
Issuance Award Request sent to IPC	Date/Time	Date Payment Request Sent to IP Coordinator
Iss Awd Payment Conf Rec'd	Date/Time	Confirmation of Payment to Inventors Rec'd
Iss Award Recognized at Luncheon	Date/Time	Date Award was Recognized at Inn. Awds. Banquet
Date 5th Patent Issued	Date/Time	Date Application Issued
US Patent Numbers	Text	US PATENT Numbers for 5 Issued Patents

Fig. 25

Date BIPMAN Notified of Inv Ach Awd	Date/Time	Date BIPMAN Notified by Legal
Inv Ach Award Request sent to IPC	Date/Time	Date Payment Request Sent to IP Coordinator
Inv Ach Awd Payment Conf Rec'd	Date/Time	Confirmation of Payment to Inventors Rec'd
Inv Ach Award Recognized at Luncheon	Date/Time	Date Award was Recognized at Inn. Awds. Banquet
Date General Award Appl Rec'd	Date/Time	Date Application Filed
General Award Request sent to IPC	Date/Time	Date Payment Request Sent to IP Coordinator
General Awd Payment Conf Rec'd	Date/Time	Confirmation of Payment to Inventors Rec'd
General Award Recognized at Luncheon	Date/Time	Date Award was Recognized at Inn. Awds. Banquet
Date Article Published	Date/Time	Date Application Filed
Date BIPMAN Notified of Publication	Date/Time	Date BIPMAN Notified by Legal
Rec'd Request for Release Form	Date/Time	Req. for Release Form Rec'd
Publicaton Award Request sent to IPC	Date/Time	Date Payment Request Sent to IP Coordinator
Confirmation of Paymnet Rec'd	Date/Time	Confirmation of Payment to Inventors Rec'd
Publ Award Recognized at Luncheon	Date/Time	Date Award was Recognized at Inn. Awds. Banquet
General Notes	Memo	Comments
Award Type	Text	Type of Award
Gift Received	Text	Gift Sent to Inventor
Disclosure Title	Memo	Title of Patent Disclosure
Application Title	Memo	Title of Patent Application
Patent Title	Memo	Title of Issued Patent
Publication Title	Memo	Title of Published Article
General Award Title	Memo	Reason for General Award
$ Amount of General Awrd	Text	$ Amount of General Award
BellSouth Employee	Text	Still with BellSouth?
DHTitle	Text	Department Head's Title
BSCC ESP Disclosure	Text	Designates if disclosure was rec'd thru BSCC ESP Program
ESP Coordinator	Text	Esp Coordinator's Name

Innovation Awards Database - Company Addresses Table

Field Name	Data Type	Description
CompanyName	Text	
FormalName	Text	
BusAdr2	Text	
City	Text	
State	Text	
ZipCode	Text	

Innovation Awards Database - ESP Coordinators Table

Field Name	Data Type	Description
ESP Coordinators	Text	
Company	Text	
Market	Text	
Department	Text	
State/Region	Text	
Phone	Text	
Fax	Text	
Street Address 1	Text	
Street Address 2	Text	
City	Text	
State	Text	
ZipCode	Number	
Mail Code	Text	

Fig. 26

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Innovation Awards Database - IP Coordinators Table		
Field Name	**Data Type**	**Description**
IP ID #	Text	IP Coordinator ID #
FullNameIPC	Text	Coordinator's Full Name
Title	Text	Mr., Ms., Dr., etc.
CompanyName	Text	Company Name
BusAdr1	Text	Mailstop
BusAdr2	Text	Street Address
City	Text	City
State	Text	State
ZipCode	Text	Zip
Phone #	Text	Business Phone
FAX#	Text	Business FAX

Innovation Awards Database - Queries		
Queries		**Description**
Awards Query		
By Date & IPC - Apps Filed		
By Date & IPC - Disclosures Filed		
By Date & IPC - Patents Granted		
By Date & IPC - Apps Filed		
Certificates for Publication Awards		
Certificates for Recipients of Filing Awards		
Certificates for recipients of Issuance Awards		
Company Order		
DH Mailing Labels - Filing Awards		
DH Mailing Labels - Inv Ach Awards		
DH Mailing Labels - Issuance Awards		
DH Mailing Labels - Publication Awards		
DH of Recipients of Filing Awards		
DH of Recipients of Inventor Ach Awards		
DH of Recipients of Issuance Awards		
DH of Recipients of Publication Awards		
Disclosure Award Letter		
Disclosure Award Letter Query		
Disclosure Gift Check		
General Award		
Inventor Achievement Award		
Inventor Mailing Labels - Filing Awards		
Inventor Mailing Labels - Inv Ach Awards		
Inventor Mailing Labels - Issuance Awards		
Inventor Mailing Labels - Publication Awards		
Issuance Award Winner Check		
Open Filing Awards		
Open General Awards		
Open Inventor Achievement Awards		
Open Issuance Awards		
Open Publications Awards		
Patent Filing Award		
Patent Issuance Award		
Progress Report		
Publications Award		
Recipients of Filing Awards		

Fig. 27

Recipients of Inventor Achievement Awards		
Recipients of Issuance Awards		
Recipients of Publication		
Innovation Awards Database - Forms		
Forms		**Description**
Awards		
Company Addresses		
ESP Coordinators		
IP Coordinators		
Innovation Awards Database - Reports		
Forms		**Description**
Awards		
By Date & IPC - Apps Filed		
By Date & IPC - Disclosures Filed		
By Date & IPC - Patents Granted		
Copy of Recipients of Issuance Awards - Reports for Award Mfg.		
DH of Recipients of Filing Awards		
DH of Recipients of Inventor Ach Awards		
DH of Recipients of Issuance Awards		
DH of Recipients of Publication Awards		
Disclosure Award Letter		
General Award Form		
Inventor Achievement Award Form - 10 issued		
Inventor Achievement Award Form - 5 issued		
Open Filing Awards		
Open General Awards		
Open Inventor Achievement Awards		
Open Issuance Awards		
Open Publications Awards		
Patent Filing Award Form		
Patent Issuance Award Form		
Progress Report		
Publication Award Form		
Recipients of Filing Awards - sort by Award #		
Recipients of Filing Awards - Sort by Inventor Name		
Recipients of Inventor Achievement Awards - Sort by Award #		
Recipients of Issuance Awards - Sort by Award #		
Recipients of Issuance Awards - Sort by Inventor Name		
Recipients of Publication Awards - Sort by Award #		
Recipients of Publication Awards - Sort by Inventor Name		
Verification Table		

Fig. 28

BellSouth Intellectual Property Marketing Database

Status of Opportunity:	L2 - Awaiting Execution Pre-Transaction	Opportunity No.	1
Date Status Changed To:	L1 / L2 12/9/98 / L3 / L4 / L5		
Product/Project Name:	TechNet	Deal Size:	C = LARGE
Product Group:	Network	Deal Priority:	A = LOW
Product Type:	Software	Top Deals Rept?	
Type of IP Involved:	Proprietary Information	Est. $$$ Range:	
Patent Status:	Filed	Deal $$$ Value:	

BellSouth Entity:	BellSouth Telecommunications, Inc.	BIPMARK Lead:	CB
Sub-entity Name:	Nework	BIPMARK Support 1:	
BellSouth Contacts:	Bill Smith	BIPMARK Support 2:	
		BIPMARK Support 3:	

Marketing Participant:	Andersen Consulting (to BT, SBC)	Participant Type:	Remarketing
Address:		Participant Contacts:	
City, State, Zip			

Estimated Availability Date:	1/ 1/99
Description of Opp.:	
Status of Deal:	
Background of Deal:	
IT Platform:	
Financial Analysis:	
Competitive Analysis:	
Comments for Top Deals Report:	
Next Scheduled Follow-Up Date:	1/15/99
Follow-Up Actions to be Taken:	Check on status of investigation

Fig. 29

Deals/Potential Opportunities
Prioritization of Top Deals

Status	Product/Project Name	Oppt#	BellSouth Entity	Patent Status	Company Name	Lead	Support	Est. Value	Deal Size	Priority	Reason/Comments

[0=Prelim Opportunity][1=Yrkd Research in Progress][2=Awaiting Exec. Pre-Transaction Report][3=Negotiations In Progress][4=Awaiting Exec. Agmt/Transaction Report][5=Contract Completed/Closed]

Tuesday, December 14, 1999 — PRIVATE/PROPRIETARY
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Fig. 3II

BellSouth Intellectual Property Marketing Corporation
Level 1 (Initial Research in Progress) WIP Report

Date Generated: Tuesday, December 14, 1999

Product/Project Name	Subsidiary Name	Opp#	Patent Status	Company Name	BIPMARK Lead	BIPMARK Support	Est. Value	Deal Size	Priority	Date Chgd to L1

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Fig. 31

REPLACEMENT SHEET

BELLSOUTH

Intellectual Property Companies
Contract Tracking Database

Agreement Type:
First Party:
Second Party:
Third Party:
Effective Date: Termination or Renewal Date:
Termination or Renewal Terms:
Confidentiality Period?:
Executed Copy on File?: Location of Original:
Comments:
View Executed Contract:
View Other Document:

For Remarketing Agreements Only:
Affiliate Involved:
Transaction Type: Project Name:
Type of IP Involved:
View Transaction Report:

Frequency of Payment:
Payment Royalty Due Date: Amount Due:
Additional Payment Terms:
YTD Totals: 1999: 2000: 2001: 2002: 2003:

Fig. 12

Unexecuted Agreements
Agreement Type
First Party
Second Party
Tuesday, December 14, 1999
Page 1 of 1

Fig. 33

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Award# D99-192 Type Disclosure Award Legal Case # 99192 Key # 868

Inventor Information

Title Mr. Name
BellSouth Co.
Suite
Address
City State Zip

Phone No.:
FAX No.s
Still BellSouth employee?
IP Coordinator ID#:

Inventor's Supervisor

Title Name
Suite
Address
City State Zip

Inventor's Department Head

Grtg Name
Title
Suite
Address
City State Zip

Disclosure Award

Title: Sales Information Storage/Tracking/Notification

11/11/99 Disclosure Received by Legal
11/11/99 Disclosure Received by BIPMAN
11/16/99 Letter and Gift Sent to Inventor
Gift Sent Wooden Pen
BSCC ESP Program No Coord. Name

Filing Award

Title:

Date Application Filed
Date BIPMAN Notified of Filing
Filing Award Request Sent to IPC
Filing Award Payment Conf. Rec'd
Filing Award Recognized at Banquet

Assuance Award

US Patent Number
Title:

Date Patent Issued
Date BIPMAN Notified of Issuance
Issuance Award Request Sent to IPC
Issuance Award Payment Conf. Rec'd
Iss. Award Recognized at Banquet

Publication Award

Title/ Public Name:

Date Article Published
Date BIPMAN Notified of Publication
Rec'd Request for Release Form
Publication Award Request Sent to IPC
Confirmation of Payment Rec'd
Publ. Award Recognized at Banquet

Inventor Achievement Award

Patent Nos.

Date Last Patent Issued
Date BIPMAN Notified of Inv. Ach Awd
Inv. Ach. Award Request Sent to IPC
Inv. Ach. Award Payment Conf. Rec'd
Inv. Ach. Award Recognized at Banquet

General Award

Title:

$ Amount of General Award
Date General Award Appl Rec'd
General Award Request Sent to IPC
General Award Payment Conf. Rec'd
Gen. Award Recognized at Banquet

General Notes

Fig. 34

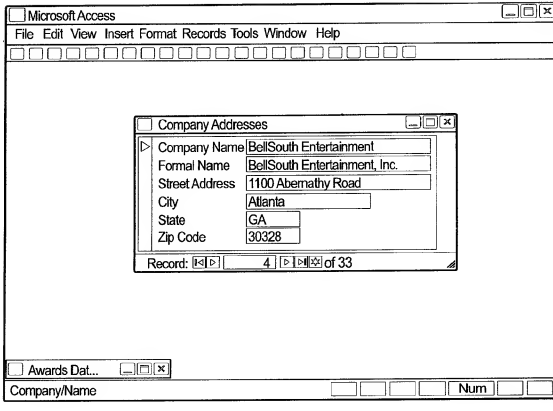
Microsoft Access
File Edit View Insert Format Records Tools Window Help
Company Addresses
Company Name
BellSouth Entertainment
Formal Name
BellSouth Entertainment, Inc.
Street Address
1100 Abernathy Road
City
Atlanta
State
GA
Zip Code
30328
Record:
4
of 33
Awards Dat...
Company/Name
Num

Fig. 35

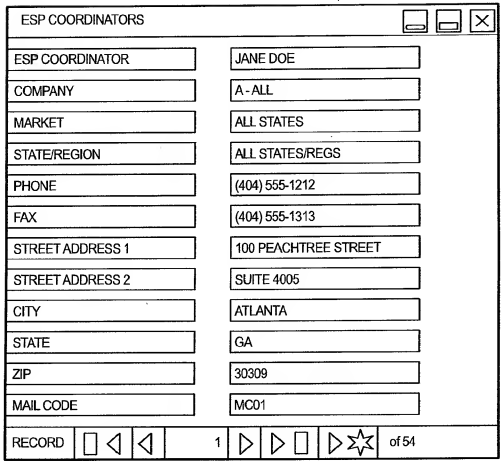
ESP COORDINATORS
ESP COORDINATOR
JANE DOE
COMPANY
A - ALL
MARKET
ALL STATES
STATE/REGION
ALL STATES/REGS
PHONE
(404) 555-1212
FAX
(404) 555-1313
STREET ADDRESS 1
100 PEACHTREE STREET
STREET ADDRESS 2
SUITE 4005
CITY
ATLANTA
STATE
GA
ZIP
30309
MAIL CODE
MC01
RECORD
1
of 54

Fig. 36

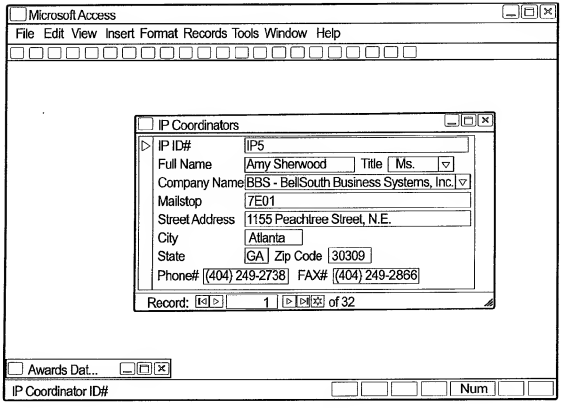
Microsoft Access
File Edit View Insert Format Records Tools Window Help
IP Coordinators
IP ID# IP5
Full Name Amy Sherwood Title Ms.
Company Name BBS - BellSouth Business Systems, Inc.
Mailstop 7E01
Street Address 1155 Peachtree Street, N.E.
City Atlanta
State GA Zip Code 30309
Phone# (404) 249-2738 FAX# (404) 249-2866
Record: 1 of 32
Awards Dat...
IP Coordinator ID#
Num

Fig. 37

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Innovation Award Request
Patent Filing Award

Date of Request	BellSouth File No.	Innovation Award No.
December 8, 1999	*98059*	*A99-075*

Date Application Filed:

Title of Application:

Please arrange payment of a Specific Innovation Award for filing of a patent application for the inventor listed below. Innovation Awards should be grossed up for federal and state taxes. Due to the significance of this contribution to BellSouth, the award should be presented in an appropriate ceremony in the presence of the inventor's peers and/or higher management.

Award Amount:

Approved By: __X__ *IP Legal*
____ *BellSouth IP Management Corp.*

Inventor Name	Inventor Signature
Supervisor Name	Supervisor Signature
IP Coordinator Name	IP Coordinator Signature

Certification of payment and this signed request form must be returned to:

Julia Spires, Intellectual Property Administrator
1155 Peachtree Street, NE - Suite 500 - Atlanta, GA 30309
(404) 249-2961

PRIVATE/PROPRIETARY/LOCK

Contains Private and/or Proprietary Information. May not be used or disclosed outside the BellSouth Companies except pursuant to a written agreement. Must be stored in locked files when not in use.

Fig. 38

MEMORANDUM

To:	John E. Lewis
From:	Marcus Delgado
Date:	December 8, 1999
RE:	Notification of Patent Application Filing for
	Title:
	BellSouth No.:
	Filing Date:

The above-referenced patent application was filed in the U.S. Patent and Trademark Office ("PTO") on the filing date shown above. We expect the official filing receipt, including the assigned serial number for this application, within the next several weeks.

We will keep you advised of further progress as the application proceeds through the PTO.

cc: Donna Post

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Fig. 39

Patents Granted 9/1/99 Through 11/30/99

Award	Legal No.	Inventor Name	Company Name	Patent Title	US Patent No.	Date Issued
A99-067	96013	JoAnn Blount (retired)	BSCC - BellSouth Cellular Corp.	Method and System for Automatically Connecting Telephone Calls to Multiple Devices Having Different Directory Numbers (as amended)	5,953,864	10/5/99

Tuesday, December 14, 1999 Page 1 of 1

Fig. 40

Intellectual Property Management Database System

Marketing Table

Field Name	Data Type	Description	Relates (KEY)	Location of Data	Editable	Security	Comments
Project Number	Number	Unique number to keep track of each project	PK	System generated	Non-editable		
Project Name	Character	Name of the project		Free Form	Editable		
Status of Project	Character	Status of the project		Lookup Table	Editable		
Status Date	Date	Anticipated dates for different status levels. Pulls additional information into database, Name contact, Phone - from People/Address table		Can be system generated and/or free form	Editable		A version can update when changing status levels.
Customer		Customer Name		Lookup Table	Editable		
		Contact					
		Phone					
		Party to final contract?					
Remarketing Partner		Pulls additional information into database, Name, Contact, Phone, party to final contract - from People//Address table		Lookup Table	Editable		
		Company Name					
		Contact					
		Phone					
		Party to final contract?					
IP Group Personnel		Pulls additional information into database, Name, Role, party to final contract - from People/Address table		Lookup Table	Editable		
		Name					
		Role					
Products	Character	Pointer back to product table		Lookup Table	Editable		
		Product Name					
Deal Size	Character	Drop Down Estimate, small, medium and large		Lookup Table	Editable		
Deal Value	Number	Actual deal value entered after the deal is closed		Free Form	Editable		
Deal Priority	Character	low, medium, high		Lookup Table	Editable		
Include in Top Deals Report	CHAR(1)	Check box designating as important deal		Free Form	Editable		
Description of Project	Character			Freeform	Editable		
Followup Date	Date	Next Scheduled Followup Date		Freeform	Editable		
Followup Actions	Character	Followup Actions Taken		Freeform	Editable		
Responsible Party	Character	Responsible Party for Followup - Looks at People/Address Table - Potentially allow multiple values		Lookup Table	Editable		

Fig. 41

Fig. 47

Files	Character	pointer back to files and file comments		Freeform	Editable		
		File					
		Comments					
		Pointer that pulls information from contract table -					
Associated Contract		including name		Lookup Table	Editable		
		Name					
		Agreement Type					
			Contract Tracking Table				
Field Name	Data Type	Description	Relates (KEY)	Location Data	Editable	Security	Comments
Agreement Number	Number		KEY	System Generated	Non-Editable		
Agreement Name	Character			Freeform	Editable		
Agreement Type	Character			Lookup Table	Editable		
Project Number	Number	Key field for linking to marketing opportunities	Potentially a Foreign Key	Potentially a Foreign Key	Non-Editable		
Parties	Character	Lookup to People/Address table		Lookup Table	Editable		Should be able to add to the list
		Company Name					
		Type					
		Contact					
Effective Date	DATE			Freeform	Editable		
Termination/Renewal Date	DATE			Freeform	Editable		
Termination/Renewal Terms	Character			Freeform	Editable		
List IP	Character	List of IP involved; pop-up box to add IP pointers; IP Type, Name, Ref.##	Potentially a Foreign Key	Potentially a Foreign Key	Non-Editable		User can modify which IP is licensed
		Type					
		Name					
		Ref. #					
Exclusivity	Character	values: exclusive,non-exclusive		Lookup Table	Editable		
Form of Agreement	Character	values: Distribution License, Straight Use License, Strategic Agreement		Lookup Table	Editable		
Description	Character			Freeform	Editable		
Type of Royalty	Character	values: cash, savings, cash & savings		Lookup Table	Editable		
Unique Id	Character			Freeform	Editable		
Frequency of Payment	Character			Lookup Table	Editable		
Reason for termination	Character			Freeform	Editable		
Type of License	Character	Do we still want this? ...not on screen shots		Lookup Table			
Confidentiality Period	DATE			Freeform	Editable		This can be a range or a final date.

File	Character	Pointer to attached files and comments	Freeform	Editable		
		File Name				
		Comments				
Product	Character					
BellSouth Business Unit	Character	Pointer to BellSouth Business Unit and Royalty Percentage	Lookup Table	Editable		
		BellSouth Business Unit				
		Royalty Percentage				
Notice Date	Date					
Cassmes Party to Contract	Character					
Parties to Contract	Character					
Underlying IP of Product	Character					
Action	Character	Button (field) that points to information in the action table	Lookup Table			
		Expected Due Date				
		Actual Date				
		Action Type (Lookup)				
		Expected Amount				
		Actual Amount				
		Expected Action				
		Actual Action				
		Internal Contact				
		External Contact				
Comments	Character	Comments	Freeform			

IP TABLE (Trade Secrets or Copyrights)

Field Name	Data Type	Description	Relates (Key)	Location Data	Editable	Security	Comments
			Primary Key				
IP #	Number	System Generated		Primary (Key	Non-Editable		
IP Type	Character	TX or Copyright or Both		Lookup Table	Editable		
IP Name	Character			Freeform	Editable		
BellSouth Sub-entity	Character			Freeform	Editable		
BellSouth Business Unit	Character			Lookup Table	Editable		Could also be freeform
IP Description	Character	Freeform comments		Freeform	Editable		
Associated Files Attached	Character	Pointer to electronic file and comments		Freeform	Editable		
		File Name					
		Comments					
Copyright Filed?	Character	Build Lookup N/A, Yes or No		Lookup Table	Editable		

Fig. 47

Fig. 44

Product Table							
Field Name	Data Type	Description	Relates (KEY)	Location Data	Editable	Security	Comments
Product Description	Character	Product Description		Freeform	Editable		
Product Number	Number	System Generated	Primary Key	Primary Key	Non-Editable		System Generated
BellSouth Sub-entity	Character			Freeform	Lookup Table		
BellSouth Business Unit	Character	Allow multiple values		Lookup Table	Editable		Could also be freeform
BellSouth Contacts	Character	Pointer to People/Address Table, Name, Phone and Position (e.g., role)		Freeform	Editable		
		Name					
		Phone #					
		Position					
List of Patents	Character	Pointer to CPI Patent Database Records		CPI System	Editable		
		Status					
		Docket #					
		Country					
		App. #					
		Filing Data					
		Patent #					
		Issue Date					
		Inventor					
		Title					
		Comments - Not sure if in CPI					
List of TM	Character	Pointer to CPI TM Database Records		CPI System	Editable		
		Status					
		Mark					
		Country					
		app.#					
		Docket #					
		Filing Date					
		Reg. #					
		Reg. Date					
		Renewal Date					
		Comments - Not sure if in CPI					
List of Trade Secrets & Copyrights	Character	Pointer to IP Table		Lookup Table	Editable		
		Name					
		Description					
		BellSouth Sub-entity					
		BellSouth Business Unit					
		IP #					

Date Available for Sale	DATE			Freeform	Editable		
Technical Requirements	Character			Freeform	Editable		
Product Name	Character	allow multiple values		Freeform	Editable		
Files	Character	pointer to files and comments		Lookup Table	Editable		
		File Name					
		Comments					
			Patents table (CPI) Used in IP table				
Field Name	Data Type	Description	Relates (KEY)	Location Data	Editable	Security	Comments
Patent #							
Issue Date							
Inventor							
Status							
Docket #							
Title							
Country							
App.#							
Filing Date							
Comments		This may not be in CPI					
			Trademark table (CPI) Used in IP table				
Field Name	Data Type	Description	Relates (KEY)	Location Data	Editable	Security	Comments
Mark							
Reg. #							
Registration Date							
Status							
App.#							
Country							
Filing Date							
Renewal Date							
Comments		This may not be in CPI					
			Com/Org Table				
Field Name	Data Type	Description	Relates (KEY)	Location Data	Editable	Security	Comments
Name							
Type		IP Group, Remarking, Customer, Alliance					

Fig. 45

People\Adress table

Field Name	Data Type	Description	Relates (KEY)	Location Data	Editable	Security	Comments
Org							
Name							
Phone							
Address							
Comments							
Position							
Roles Lookup Values							
Contact							
Research							
Other							
IP Contact Lookup Values							
IP Group Presume							
Legal Assistants							
Bell Users Lookup							
Status Lookup Values		Used in Marketing Module					
Conduct Initial Research							
Conduct Market Research and Analysis.							
Develope marketing plan & package							
Sell product.							
Negotiate contract							
Commit and approve transaction							
Execute contract							
Service contract							
Close out project							
BellSouth Business Units Lookup Values		Used in IP Inventory Module, Product Inventory Module					
BBSO (Affiliate Service Com)							
BBI (Billing Inc.)							
BBS (Business Systems)							
BCI (Cable Communications)							
BSC (Corporate)							
BSE (Enterprises)							
BSI (International)							
BSM (Mobility)							
BST (Telecomm. Options							

Fig. 46

BAPCO (Advertising and Publishing										
BAT (Applied Technology)										
BCS (Communication Systems)										
BWD (Wireless Data)										
Agreement Type Lookup Values	Used in Contract Module									
Administrative Services Agreement										
Master Licensing Agreement										
Sublicensing Agreement										
Services Agreement										
Sublease Agreement										
Consulting Agreements										
Recruiter Agreements										
Remarketing Agreements										
Fees of Payments Lookup Values	Used in Contract Module									
One-time Development/Maintenance Savings										
One Time Up-Front License Fee										
One Time Up-Front License Fee w/Future Royalties Due										
Monthly Report/Royalty Payment										
Quarterly Report/Royalty Payment										
Annual Report/Royalty Payment										

Fig. 47

ACTION TABLE

Field Name	Data Type	Description	Relates (KEY)	Location Data	Editable	Security	Comments
Action Due Date	Date			Freeform			
Action Type	Character			Freeform			
Expected Amount	Number			Freeform			
Expected Action	Character			Freeform			
BellSouth Sub-entity	Character			Freeform			This can be business unit
Royalty Expected Due Date	Date			Freeform			
Royalty Actual Date	Date			Freeform			
Royalty Action Type	Character			Lookup Table			
Royalty Expected Amount	Number			Freeform			
Royalty Actual Amount	Number			Freeform			
Royalty Expected Action	Character			Freeform			
Royalty Actual Action	Character			Freeform			
Royalty Internal Contact	Character			Lookup Table			
Royalty External Contact	Character			Lookup Table			
Royalty Comments	Character			Freeform			
Start Date	Date			Freeform			
End Date	Date			Freeform			
Period	Character			Lookup			

Fig. 48

Contacts TABLE

Field Name	Data Type	Description	Relates (KEY)	Location of Data	Editable	Security	Comments
Company Name				Freeform			
BellSouth Sub-entity				Freeform			
Type		IP Group, Remarketing, Customer, Alliance, BellSouth Internal					
Events		Pointer to Events table		Freeform			
		Date					
		Comments					
		Attached Files					
Contacts							
		Name					
		Title					
		Country					
		Address1					
		Address2					
		City					
		State					
		Zip					
		Phone					
ndividual Contact Events		Pointer to Individual Contact Events Table					
		Date					
		Comments					
		Attached Files					

Fig. 49

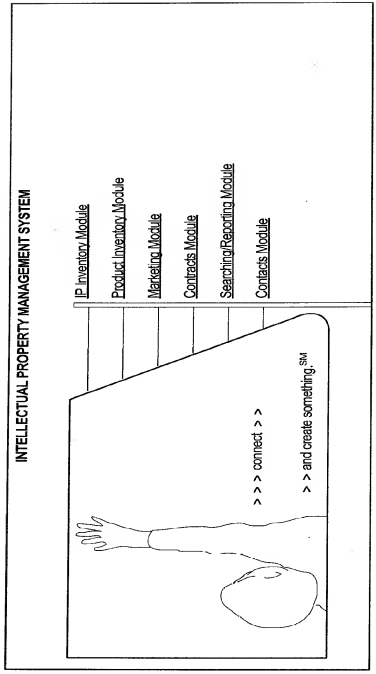

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory Module
Product Inventory Module
Marketing Module
Contracts Module
Searching/Reporting Module
Contacts Module
> > > connect > >
> > and create something℠

Fig. 50

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
P Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
IP Inventory Module
IP Inventory
Create New Trade Secret or Copyright Record
View Inventory
Search Inventory
Please choose an option from the menu bar on the left.

Fig. 51

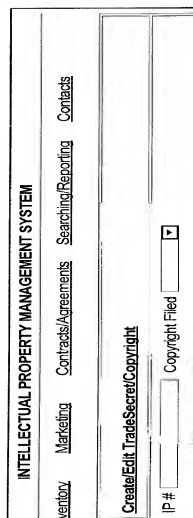

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
IP Inventory Module
Create New Trade Secret or Copyright Record
View Inventory
Search Inventory
Create/Edit TradeSecret/Copyright
IP #
Copyright Filed
IP Name
IP Type
BellSouth Business Unit
BellSouth Subentity
IP Description
Associated Files Attached
File to Attach
Browse...
Remove File
File Name
Comments
Submit
Cancel

Fig. 52

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
IP Inventory Module
View Inventory
Create New Trade Secret or Copyright Record
View Inventory
Search Inventory
Patents
Sort By N/A
Trademarks
Sort By N/A
Trade Secret & Copyrights
Sort By N/A
Submit
Cancel

Fig. 53

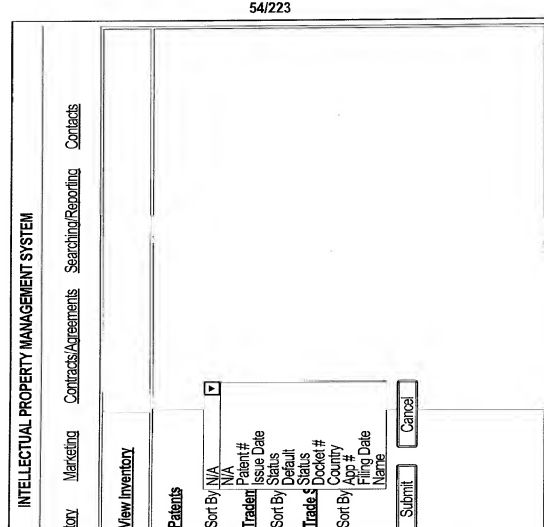

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
IP Inventory Module
View Inventory
Create New Trade Secret or Copyright Record
View Inventory
Search Inventory
Patents
Sort By N/A
N/A
Patent #
Issue Date
Status
Default
Status
Docket #
Country
App #
Filing Date
Name
Trademark
Sort By
Trade Secret
Sort By
Submit
Cancel

Fig. 54

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
IP Inventory Module
View Inventory
Create New Trade Secret or Copyright Record
View Inventory
Search Inventory
Patents
Sort By N/A
Trademarks
Sort By N/A
N/A
Trade S
Trademark Name
TM #
Sort By Registration Date
Status
Default
Submit
Cancel

Fig. 55

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
IP Inventory Module
Create New Trade Secret or Copyright Record
View Inventory
Search Inventory
View Inventory
Patents
Sort By N/A
Trademarks
Sort By N/A
Trade Secret & Copyrights
Sort By N/A
N/A
Name
BellSouth Entity
Business Unit
IP #
Description
Default
Subm

Fig. 56

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

IP Inventory Module	*View Inventory*
Create New Trade Secret or Copyright Record View Inventory Search Inventory	**Patents** Status Docket # Country Appl. # Filing Date Patent # Issue Date Inventor Title Comments Data Data Data Data Data Data Data Data Data Data **Trademarks** Status Mark Country Docket # Appl# Filing Date Reg. # Reg. Date Renewal Date Comments Data Data Data Date Data Data Data Data Data Date **Trade Secrets & Copyrights** Name Description BellSouth Entity Business Unit IP# Data Data Data Data Data

Fig. 57

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
IP Inventory Module
Search Inventory
Create New Trade Secret or Copyright Record
View Inventory
Search Inventory
Patents - CPI System
Trademarks - CPI System
Trade Secrets & Copyrights

Fig. 58

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Recording
Contacts
IP Inventory Module
Search Inventory
Create New Trade Secret or Copyright Record
View Inventory
Search Inventory
Status
Docket #
Country
App. #
Inventor
Filing Date
Patent #
Issue Date
Title
Comments
Search All Fields
Search
Cancel

Fig. 59

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

IP Inventory Module

Create New Trade Secret or Copyright Record

View Inventory

Search Inventory

Search Patents Results

Status	Docket #	Country	App.#	Filing Date	Patent #	Issue Date	Inventor	Title	Comments
Data	Data	Data	Data	Data	Data	Data	Data	Data	Data

Fig. 6II

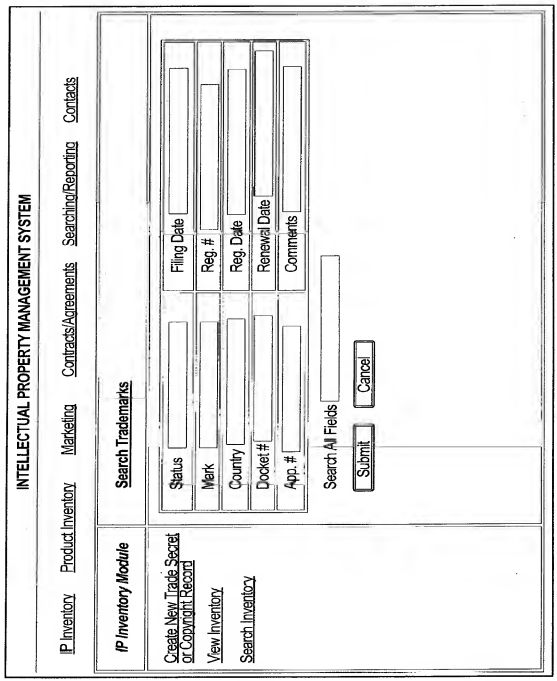

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
IP Inventory Module
Search Trademarks
Create New Trade Secret or Copyright Record
View Inventory
Search Inventory
Status
Mark
Country
Docket #
App. #
Filing Date
Reg. #
Reg. Date
Renewal Date
Comments
Search All Fields
Submit
Cancel

Fig. 61

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

IP Inventory Module	**Search Trademark Results**										
Create New Trade Secret or Copyright Record	Status	Mark	Country	Docket #	App.#	Filing Date	Reg.#	Reg. Date	Renewal Date	Comments
View Inventory	Data	Data	Data	Data	Data	Data	Data	Data	Data	Data
Search Inventory										

Fig. 62

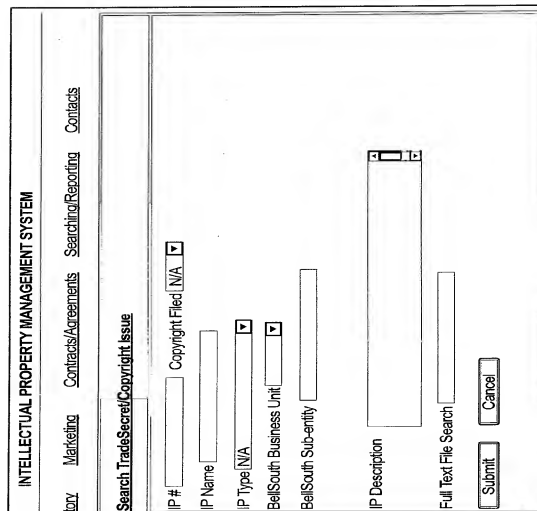

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
IP Inventory Module
Create New Trade Secret or Copyright Record
View Inventory
Search Inventory
Search TradeSecret/Copyright Issue
IP #:
Copyright Filed: N/A
IP Name:
IP Type: N/A
BellSouth Business Unit:
BellSouth Sub-entity:
IP Description:
Full Text File Search:
Submit
Cancel

Fig. 63

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
IP Inventory Module
Search Results
Create New Trade Secret or Copyright Record
View Inventory
Search Inventory
Trade Secrets & Copyrights
Name
Data
Type
Data
IP #
Data
BellSouth Business Unit
Data
BellSouth Sub-Entity
Data

Fig. 64

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Product Inventory
Create New Product
View Products
Search For Product
View/Edit Contacts
Please choose an option from the menu bar on the left.

Fig. 65

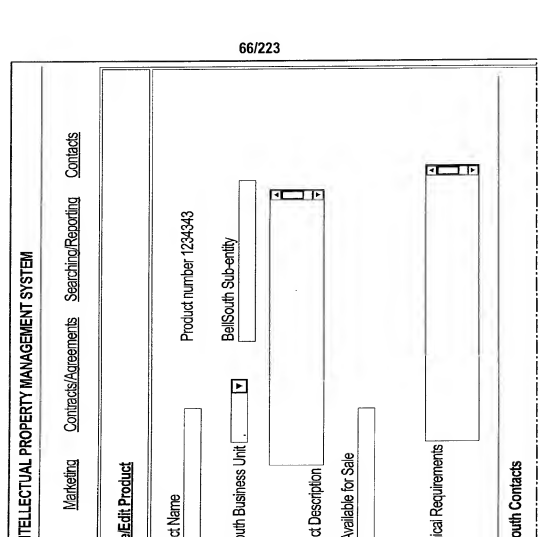

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Search/Rpt/Reporting
Contacts
Product Inventory Module
Create New Product
View Products
Search For Product
View/Edit Contacts
Create/Edit Product
Product Name
Product number 1234343
BellSouth Business Unit
BellSouth Sub-entity
Product Description
Date Available for Sale
Technical Requirements
BellSouth Contacts

Fig. 66

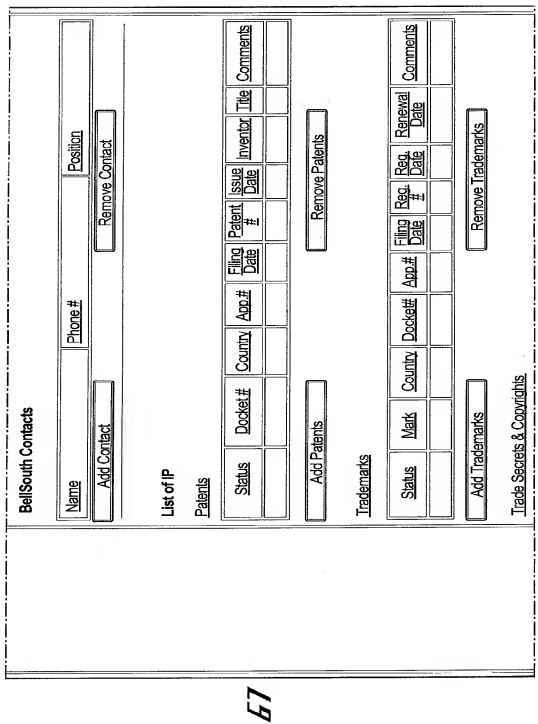

BellSouth Contacts
Name
Phone #
Position
Add Contact
Remove Contact
List of IP
Patents
Status
Docket #
Country
App.#
Filing Date
Patent #
issue Date
Inventor
Title
Comments
Add Patents
Remove Patents
Trademarks
Status
Mark
Country
Docket#
App.#
Filing Date
Reg. #
Reg. Date
Renewal Date
Comments
Add Trademarks
Remove Trademarks
Trade Secrets & Copyrights

Fig. 67

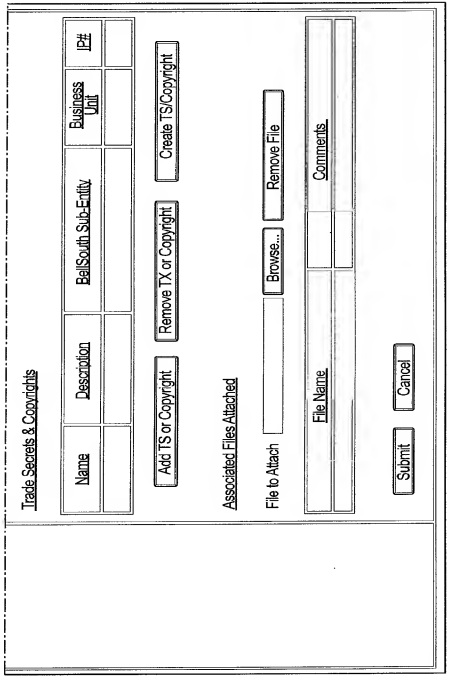

Trade Secrets & Copyrights
Name
Description
BellSouth Sub-Entity
Business Unit
IP#
Add TS or Copyright
Remove TX or Copyright
Create TS/Copyright
Associated Files Attached
File to Attach
Browse...
Remove File
File Name
Comments
Submit
Cancel

Fig. 68

Fig. 69

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

Product Inventory Module	View Products
Create New Product View Products Search For Product View/Edit Contacts	View All Products View All Products Sorted By BellSouth Business Unit View All Products for Specific BellSouth Business Unit Advanced View

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

Product Inventory Module

Create New Product

View Products

Search For Product

View/Edit Contacts

View All Products

Name	BellSouth Business Unit	Description
Data	Data	Data

Fig. 111

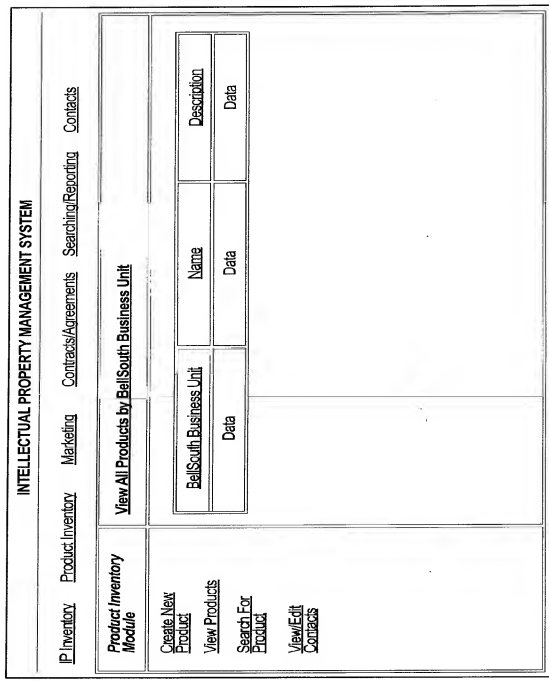

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Product Inventory Module
View All Products by BellSouth Business Unit
Create New Product
View Products
Search For Product
View/Edit Contacts
BellSouth Business Unit
Name
Description
Data
Data
Data

Fig. 11

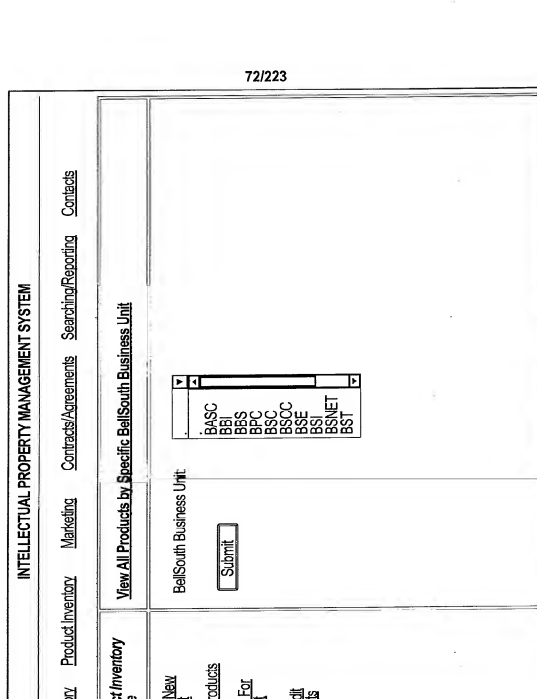

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Product Inventory Module
Create New Product
View Products
Search For Product
View/Edit Contacts
View All Products by Specific BellSouth Business Unit
BellSouth Business Unit:
Submit
BASC
BBI
BBS
BPC
BSC
BSCC
BSE
BSI
BSNET
BST

Fig. 12

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

Product Inventory Module

Create New Product

View Products

Search For Product

View/Edit Contacts

View All Products by Specific BellSouth Business Entity

BellSouth Entity	Name	Description
Data	Data	Data

Fig. 13

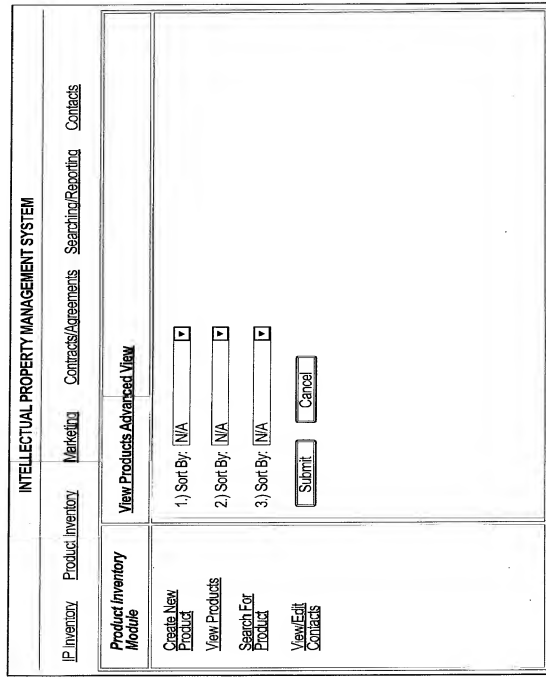

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Product Inventory Module
Create New Product
View Products
Search For Product
View/Edit Contacts
View Products Advanced View
1.) Sort By: N/A
2.) Sort By: N/A
3.) Sort By: N/A
Submit
Cancel

Fig. 14

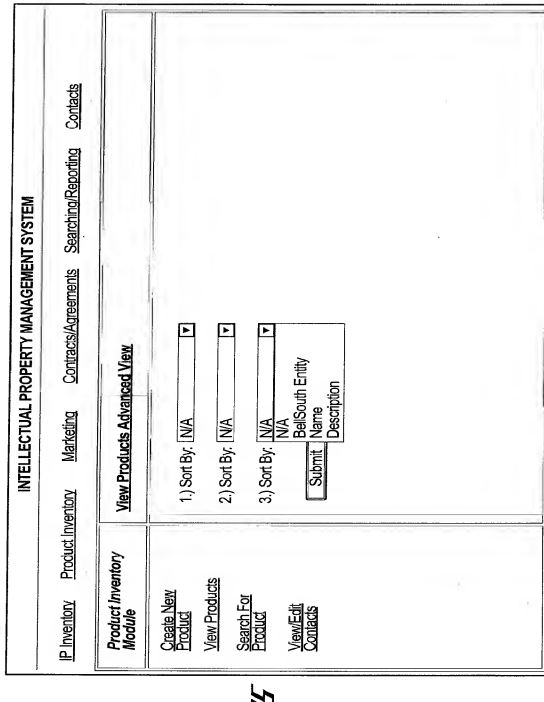

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Product Inventory Module
Create New Product
View Products
Search For Product
View/Edit Contacts
View Products Advanced View
1.) Sort By: N/A
2.) Sort By: N/A
3.) Sort By: N/A
N/A
BellSouth Entity
Name
Description
Submit

Fig. 15

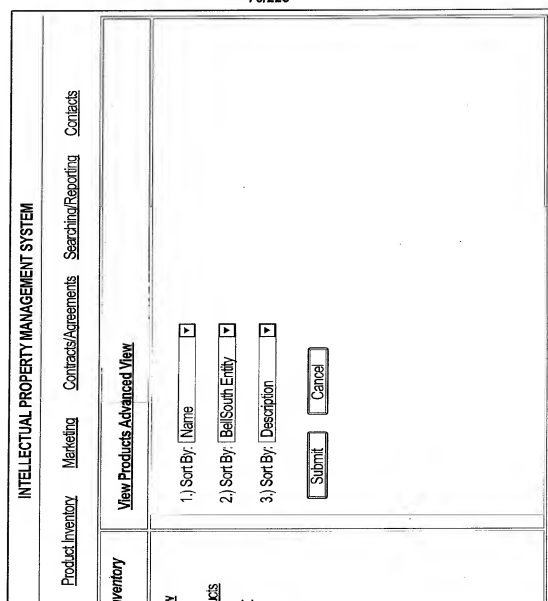

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Product Inventory Module
Create New Product
View Products
Search For Product
View/Edit Contacts
View Products Advanced View
1.) Sort By: Name
2.) Sort By: BellSouth Entity
3.) Sort By: Description
Submit
Cancel

Fig. 16

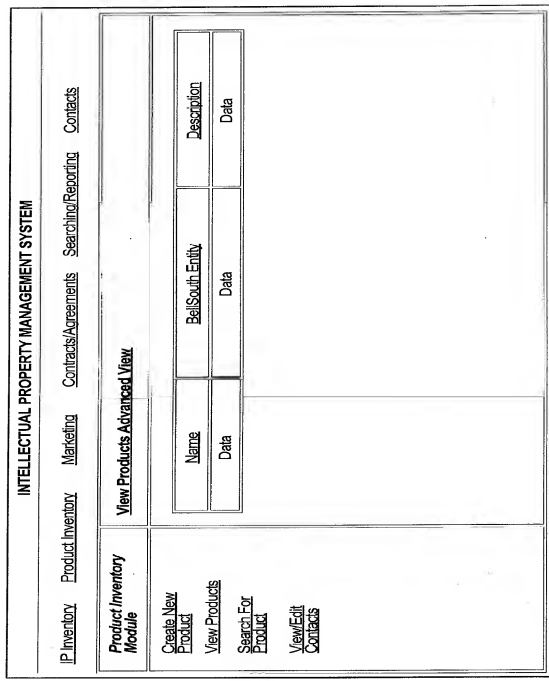

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Product Inventory Module
View Products Advanced View
Create New Product
View Products
Search For Product
View/Edit Contacts
Name
BellSouth Entity
Description
Data
Data
Data

Fig. 11

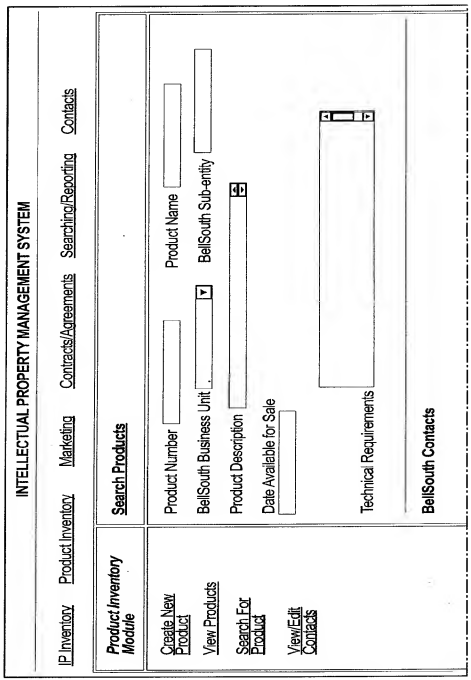

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Product Inventory Module
Create New Product
View Products
Search For Product
View/Edit Contacts
Search Products
Product Number
Product Name
BellSouth Business Unit
BellSouth Sub-entity
Product Description
Date Available for Sale
Technical Requirements
BellSouth Contacts

Fig. 1H

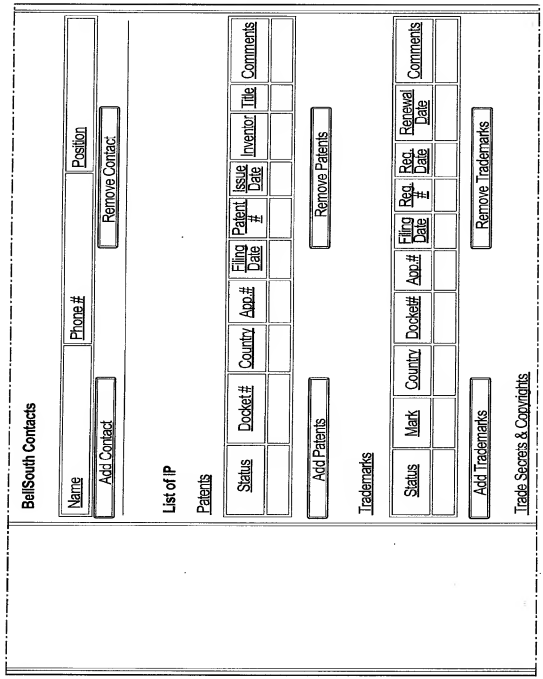

BellSouth Contacts
Name
Phone #
Position
Add Contact
Remove Contac
List of IP
Patents
Status
Docket #
Country
App.#
Filing Date
Patent #
Issue Date
Inventor
Title
Comments
Add Patents
Remove Patents
Trademarks
Status
Mark
Country
Docket#
App.#
Filing Date
Reg. #
Reg. Date
Renewal Date
Comments
Add Trademarks
Remove Trademarks
Trade Secrets & Copyrights

Fig. 19

Trade Secrets & Copyrights
Name
Description
BellSouth Sub-Entity
Business Unit
IP#
Add Trade Secrets or Copyright
Remove Trade Secrets or Copyright
Associated Files Attached
File Name
Comments
Full Text File Search
Search
Cancel

Fig. 8II

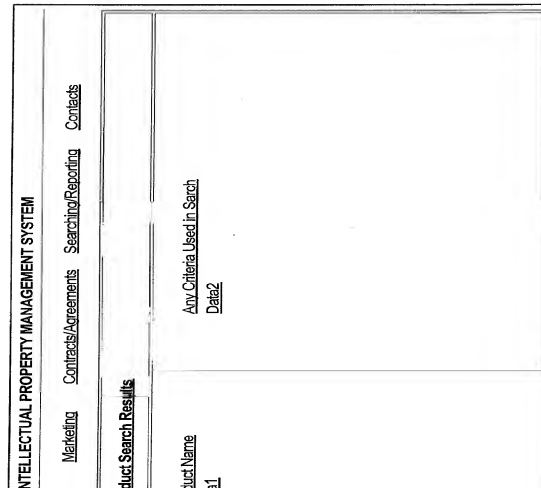

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Product Inventory Module
Product Search Results
Create New Product
View Products
Search For Product
View/Edit Contacts
Product Name
Data1
Any Criteria Used in Serch
Data2

Fig. 81

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

Product Inventory Module

Create New Product

View Products

Search For Product

View/Edit Contacts

View Product

Product Number 12323 — Product Name Product

BellSouth Sub-entity Entity — BellSouth Business Unit Main Unit

Product Description

Date Available for Sale 2/14/2000

Technical Requirements

BellSouth Contacts

Name	Phone #	Position
Howard Johnson	1-800-555-1212	Director

List of IP

Fig. 82

List of IP
Patents
Status
Docket #
Country
App.#
Filing Date
Patent #
issue Date
Inventor
Title
Comments
Trademarks
Status
Mark
Country
Docket#
App.#
Filing Date
Reg. #
Reg. Date
Renewal Date
Comments
Trade Secrets & Copyrights
Name
Description
BellSouth Sub-Entity
Business Unit
IP#
Associated Files Attached
File Name
Comments
Edit

Fig. 83

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Marketing
Create New Product
View Products
Search/Reports Projects
View/Edit Contacts
Please choose an option from the menu bar on the left.

Fig. 84

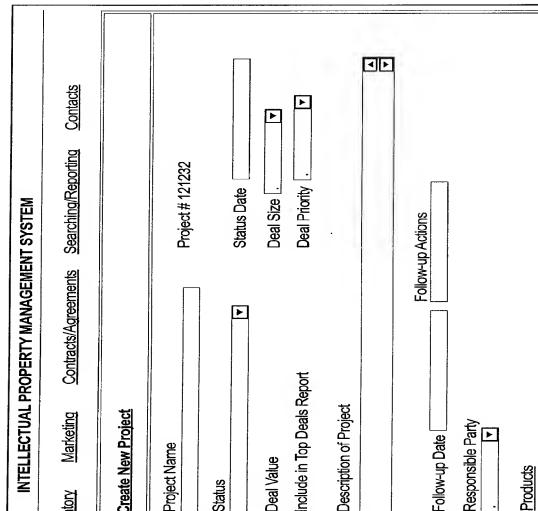

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Marketing Module
Create New Project
Create New Product
View Products
Search/Reports Projects
View/Edit Contacts
Project Name
Project # 121232
Status
Status Date
Deal Value
Deal Size
include in Top Deals Report
Deal Priority
Description of Project
Follow-up Date
Follow-up Actions
Responsible Party
Products

Fig. 85

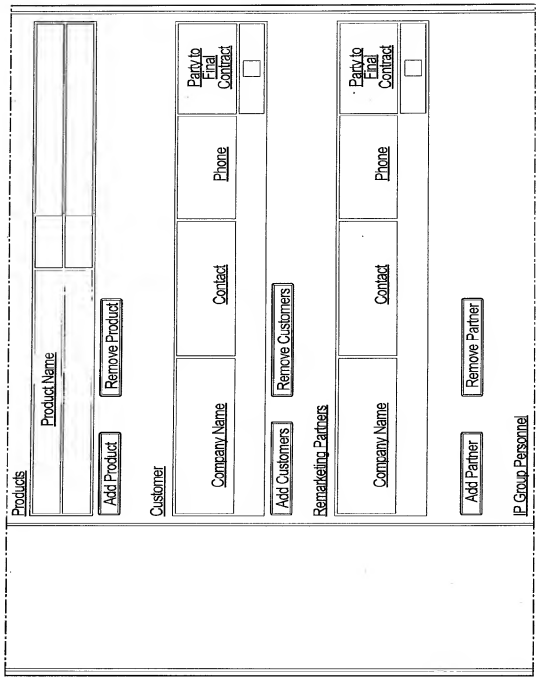

Products
Product Name
Add Product
Remove Product
Customer
Company Name
Contact
Phone
Party to Final Contract
Add Customers
Remove Customers
Remarketing Partners
Company Name
Contact
Phone
Party to Final Contract
Add Partner
Remove Partner
IP Group Personnel

Fig. 86

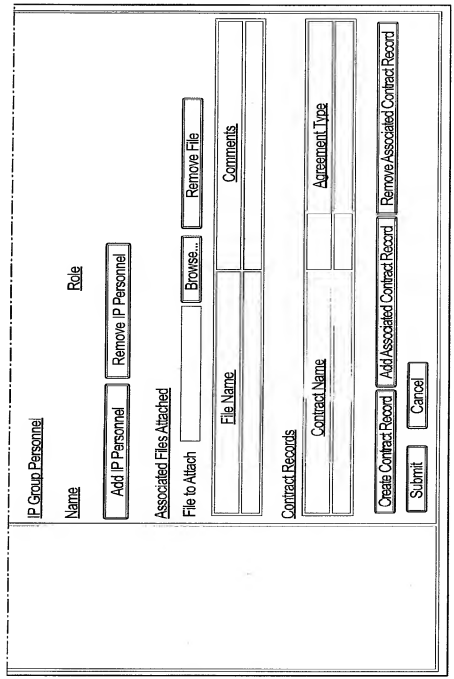

IP Group Personnel
Name
Role
Add IP Personnel
Remove IP Personnel
Associated Files Attached
File to Attach
Browse...
Remove File
File Name
Comments
Contract Records
Contract Name
Agreement Type
Create Contract Record
Add Associated Contract Record
Remove Associated Contract Record
Submit
Cancel

Fig. 87

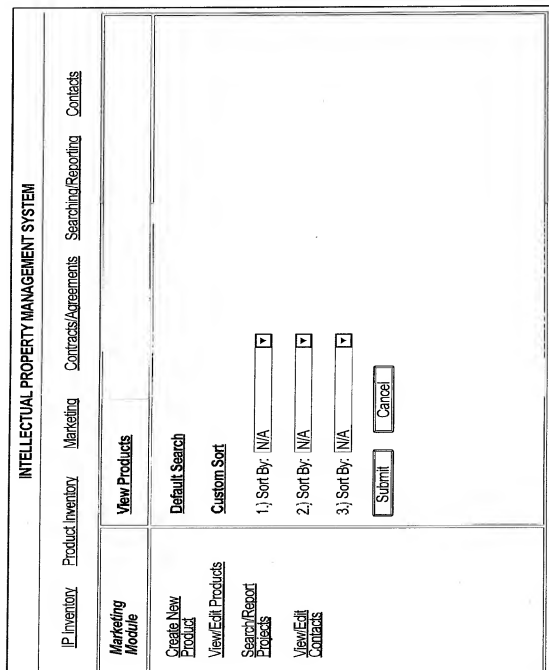

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Marketing Module
View Products
Create New Product
View/Edit Products
Search/Report Projects
View/Edit Contacts
Default Search
Custom Sort
1.) Sort By: N/A
2.) Sort By: N/A
3.) Sort By: N/A
Submit
Cancel

Fig. 88

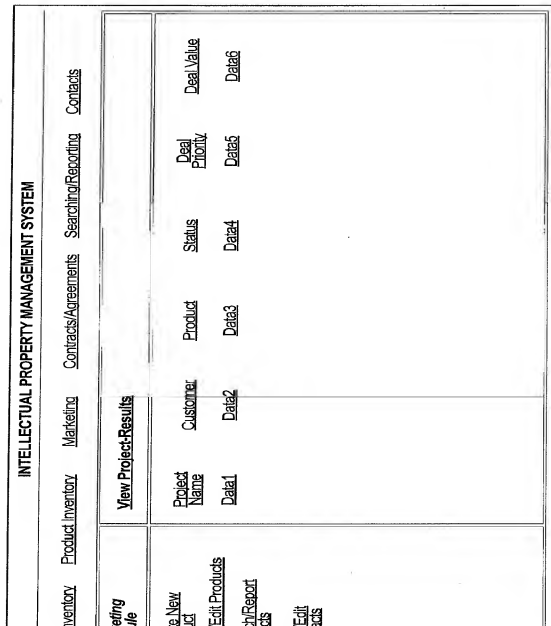

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Marketing Module
View Project Results
Create New Product
View/Edit Products
Search/Report Projects
View/Edit Contacts
Project Name
Customer
Product
Status
Deal Priority
Deal Value
Data1
Data2
Data3
Data4
Data5
Data6

Fig. 89

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Marketing Module
Create New Product
View Products
Search For Product
View/Edit Contacts
View Project
Project Name Name
Project # 121232
Status Conduct Initial research
Status Date 2/2/2000
Deal Value $1.2 Billion
Deal Size Small
Include in Top Deals Report ☐
Deal Priority Low
Description of Project
Follow-up Date 2/2/2000
Follow-up Actions Action
Responsible Party Mike Stevens
Products
Product Name
Product
Customer

Fig. 9//

Customer

Customer Name	Contact	Phone	Party to Final Contract
IBM	John Jim	212-555-1212	☐

Remarketing Partners

Company Name	Contact	Phone	Party to Final Contract
IBM	Bob Smith	212-555-1212	☐

IP Group Personnel

Name	Role

Associated Files Attached

File Name	Comments

Contract Records

Contract Name	Agreement Type

Edit

Fig. 91

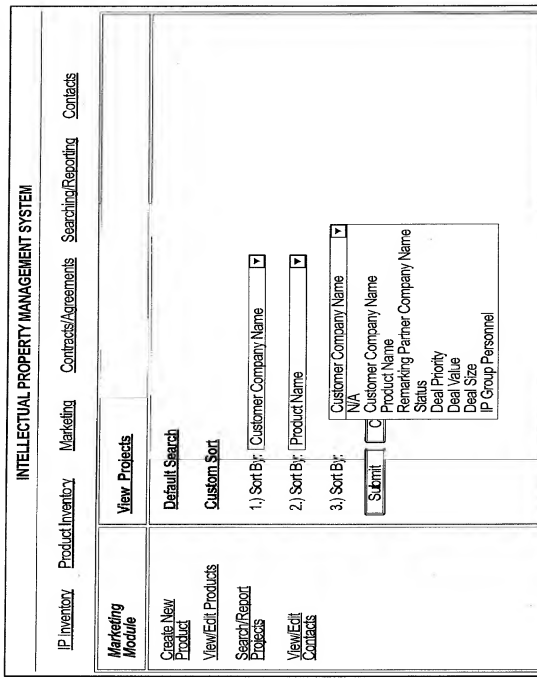

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Marketing Module
Create New Product
View/Edit Products
Search/Report Projects
View/Edit Contacts
View Projects
Default Search
Custom Sort
1.) Sort By:
Customer Company Name
2.) Sort By:
Product Name
3.) Sort By:
Customer Company Name
N/A
Customer Company Name
Product Name
Remarking Partner Company Name
Status
Deal Priority
Deal Value
Deal Size
IP Group Personnel
Submit

Fig. 92

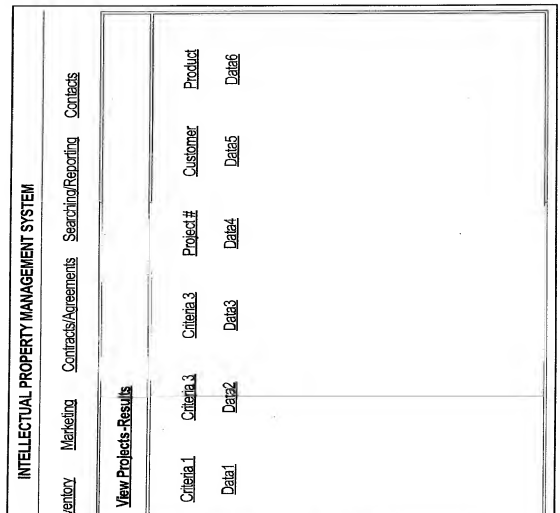

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Marketing Module
View Projects-Results
Create New Product
View/Edit Products
Search/Report Projects
View/Edit Contacts
Criteria 1
Criteria 2
Criteria 3
Project #
Customer
Product
Data1
Data2
Data3
Data4
Data5
Data6

Fig. 93

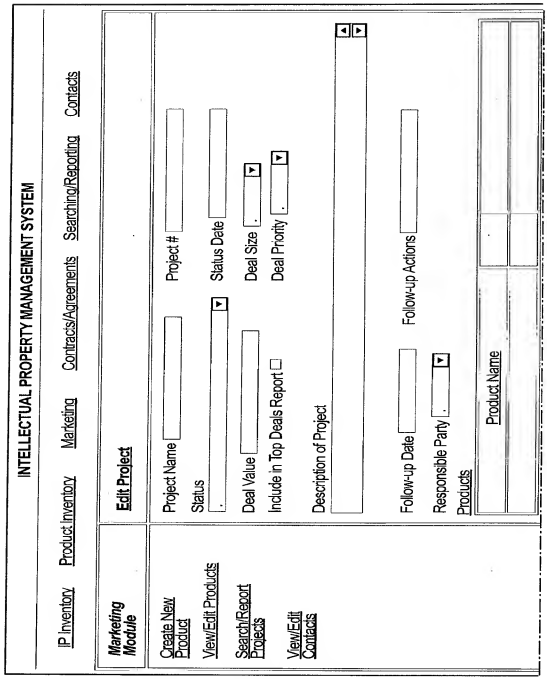

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Marketing Module
Create New Product
View/Edit Products
Search/Report Projects
View/Edit Contacts
Edit Project
Project Name
Project #
Status
Status Date
Deal Value
Deal Size
Include in Top Deals Report
Deal Priority
Description of Project
Follow-up Date
Follow-up Actions
Responsible Party
Products
Product Name

Fig. 94

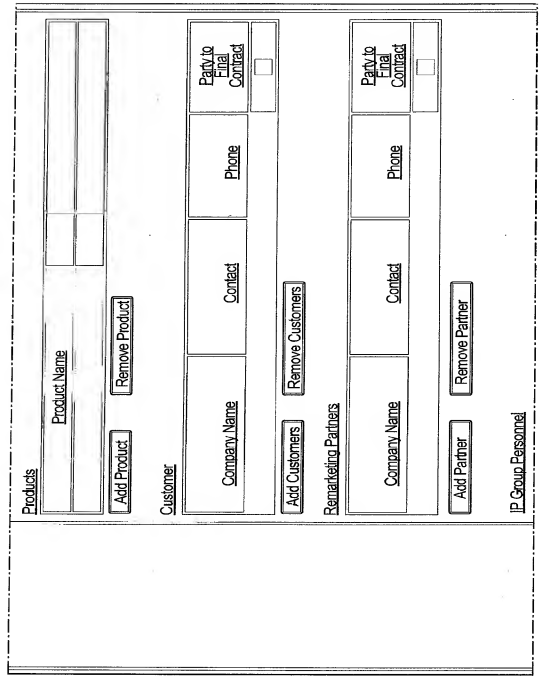

Products
Product Name
Add Product
Remove Product
Customer
Company Name
Contact
Phone
Party to Final Contract
Add Customers
Remove Customers
Remarketing Partners
Company Name
Contact
Phone
Party to Final Contract
Add Partner
Remove Partner
IP Group Personnel

Fig. 95

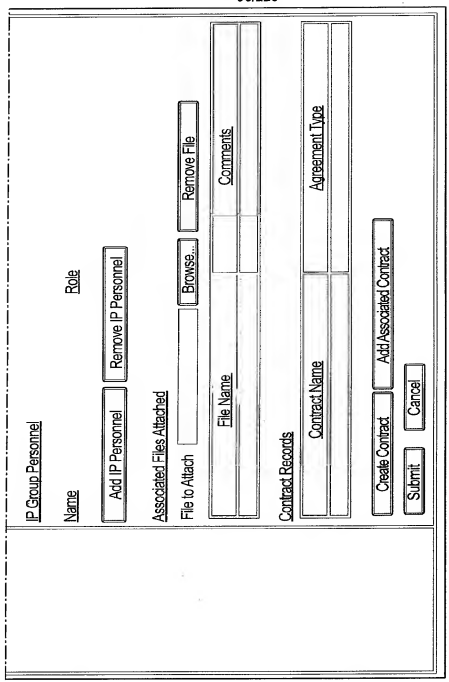

IP Group Personnel
Name
Role
Add IP Personnel
Remove IP Personnel
Associated Files Attached
File to Attach
Browse...
Remove File
File Name
Comments
Contract Records
Contract Name
Agreement Type
Create Contract
Add Associated Contract
Submit
Cancel

Fig. 96

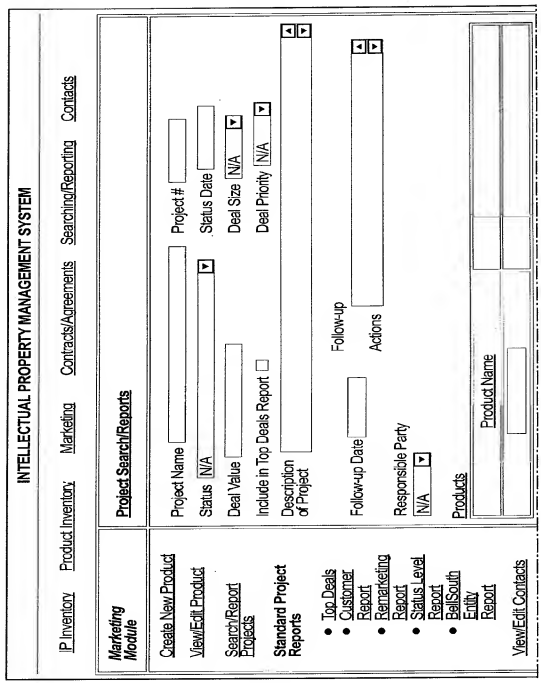

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Marketing Module
Create New Product
View/Edit Product
Search/Report Projects
Standard Project Reports
Top Deals
Customer Report
Remarketing Report
Status Level Report
BellSouth Entity Report
View/Edit Contacts
Project Search/Reports
Project Name
Project #
Status N/A
Status Date
Deal Value
Deal Size N/A
Include in Top Deals Report
Deal Priority N/A
Description of Project
Follow-up
Follow-up Date
Actions
Responsible Party
N/A
Products
Product Name

Fig. 91

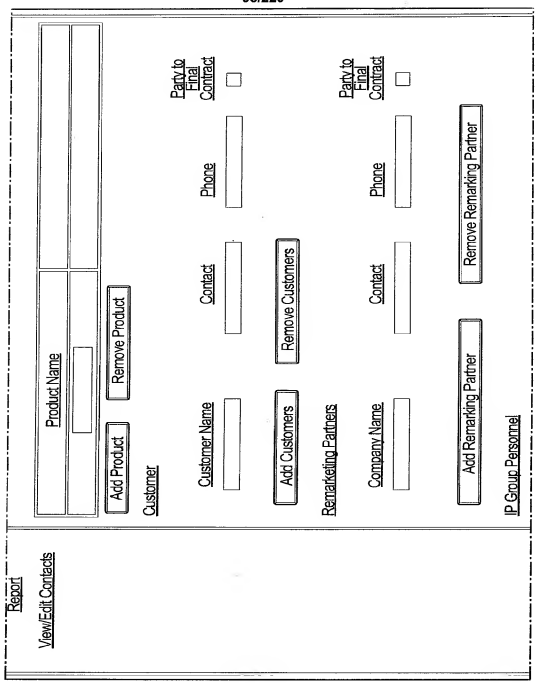

Report
View/Edit Contacts
Product Name
Add Product
Remove Product
Customer
Customer Name
Contact
Phone
Party to Final Contract
Add Customers
Remove Customers
Remarketing Partners
Company Name
Contact
Phone
Party to Final Contract
Add Remarketing Partner
Remove Remarketing Partner
IP Group Personnel

Fig. 9B

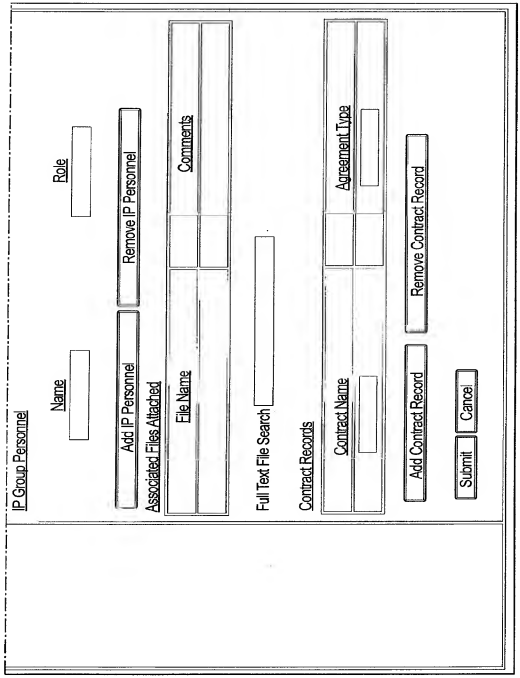

IP Group Personnel
Name
Role
Add IP Personnel
Remove IP Personnel
Associated Files Attached
File Name
Comments
Full Text File Search
Contract Records
Contract Name
Agreement Type
Add Contract Record
Remove Contract Record
Submit
Cancel

Fig. 99

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Marketing Module
Project Search/Reports
Create New Product
View/Edit Product
Search/Report Projects
Standard Project Reports
Top Deals Report
Customer Report
Remarketing Report
Status Level Report
BellSouth Entity Report
View/Edit Contacts
Project Name
Project #
Status
N/A
Status Date
Deal Value
N/A
Deal Size
Medium
Include
Conduct initial Research
Conduct market research and analysis
Complete and approve PTR
Deal Priority
High
Description of Project
Develop marketing plan & package
Sell product
Negotiate contract
Complete & approve transaction report
Follow-up
Execute contract
Set up maintenance plan
Close out Project
Responsible Party
N/A
Products
Product Name

Fig. 1III

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

Marketing Module	**View Project Search Results**			
Create New Product View/Edit Product Search/Report Projects **Standard Project Reports** • Top Deals • Customer Report • Remarketing Report • Status Level Report • BellSouth Entity Report View/Edit Contacts	Project Name Data1	Customer Data2	Product Data3	Other Search Criteria Data4

Fig. 101

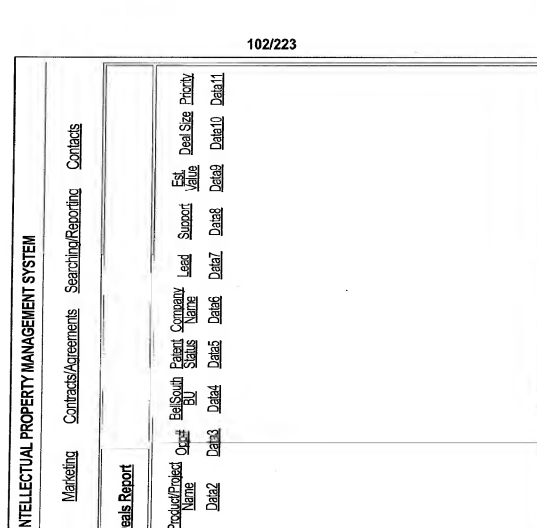

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Marketing Module
Top Deals Report
Create New Product
View/Edit Product
Search/Report Projects
Standard Project Reports
Top Deals
Customer Report
Remarketing Report
Status Level Report
BellSouth Entity Report
View/Edit Contacts
Status
Data1
Product/Project Name
Data2
Opp#
Data3
BellSouth BU
Data4
Patent Status
Data5
Company Name
Data6
Lead
Data7
Support
Data8
Est. Value
Data9
Deal Size
Data10
Priority
Data11

Fig. 102

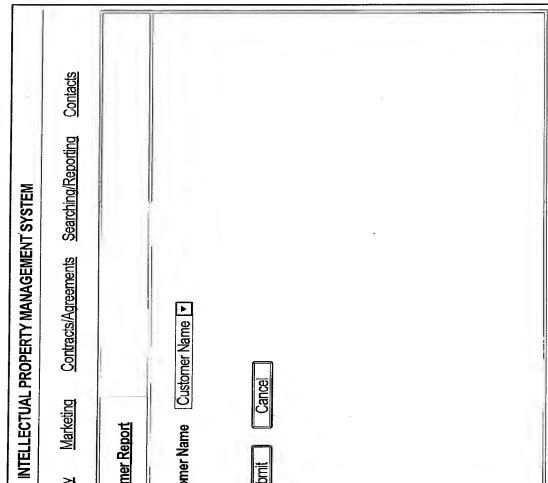

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Marketing Module
Create New Product
View/Edit Product
Search/Report Projects
Standard Project Reports
Top Deals
Customer Report
Remarketing Report
Status Level Report
BellSouth Entity Report
View/Edit Contacts
Customer Report
Customer Name
Customer Name
Submit
Cancel

Fig. 113

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

Marketing Module

Create New Product

View/Edit Product

Search/Report Projects

Standard Project Reports

- Top Deals
- Customer Report
- Remarketing Report
- Status Level Report
- BellSouth Entity Report

View/Edit Contacts

Customer Report

Customer Name	Product Name	Status	Value	BellSouth Business Unit	Opp#
Data1	Data2	Data3	Data4	Data5	Data6

Fig. 11E1H

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

Marketing Module

Create New Product

View/Edit Product

Search/Report Projects

Standard Project Reports

- Top Deals
- Customer Report
- Remarketing Report
- Status Level Report
- BellSouth Entity Report

View/Edit Contacts

Remarketing Partner Report

Remarking Company Name [Company Name ▼]

Submit | Cancel

Fig. 104

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

Marketing Module

Create New Product

View/Edit Product

Search/Report Projects

Standard Project Reports

- Top Deals
- Customer Report
- Remarketing Report
- Status Level Report
- BellSouth Entity Report

View/Edit Contacts

Remarketing Partner Report

Remarketing Partner	Product Name	Status	Value	BellSouth Business Unit	Oppt#
Data1	Data2	Data3	Data4	Data5	Data6

Fig. 115

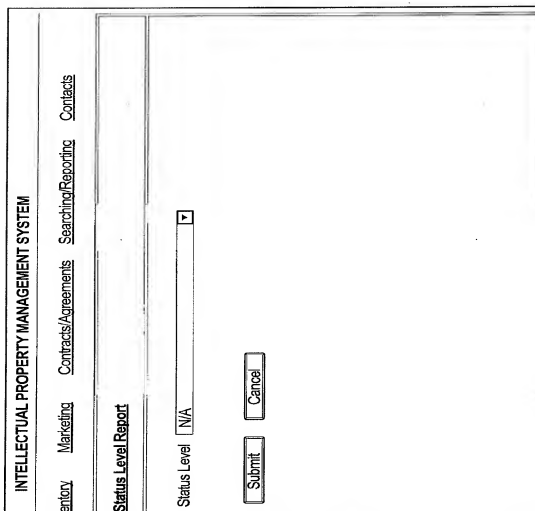

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Marketing Module
Create New Product
View/Edit Product
Search/Report Projects
Standard Project Reports
Top Deals
Customer Report
Remarketing Report
Status Level Report
BellSouth Entity Report
View/Edit Contacts
Status Level Report
Status Level
N/A
Submit
Cancel

Fig. 116

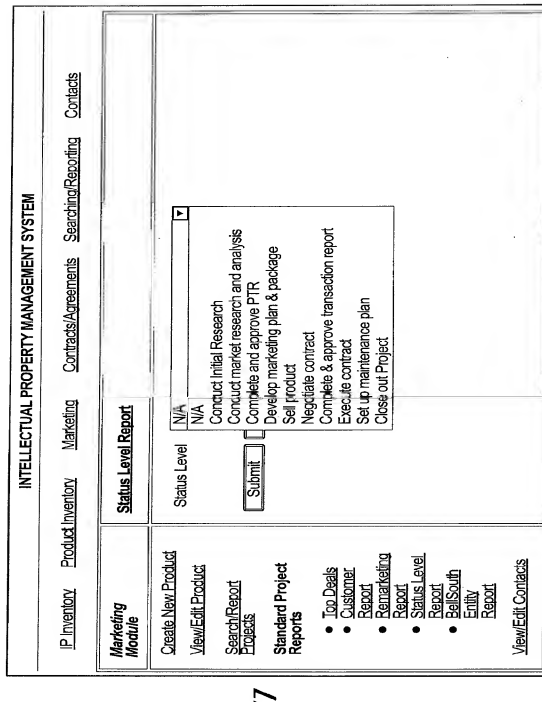

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Marketing Module
Status Level Report
Create New Product
View/Edit Product
Search/Report Projects
Standard Project Reports
Top Deals Report
Customer Report
Remarketing Report
Status Level Report
BellSouth Entity Report
View/Edit Contacts
Status Level
N/A
N/A
Conduct Initial Research
Conduct market research and analysis
Complete and approve PTR
Develop marketing plan & package
Sell product
Negotiate contract
Complete & approve transaction report
Execute contract
Set up maintenance plan
Close out Project
Submit

Fig. 107

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

Marketing Module

Status Level Report

Create New Product

View/Edit Product

Search/Report Projects

Standard Project Reports

- Top Deals Report
- Customer Report
- Remarketing Report
- Status Level Report
- BellSouth Entity Report

View/Edit Contacts

Level	Level Date	Oppt#	Company Name	Product Name	Remarketing Name	BellSouth Business Unit	IP Group Personnel	Deal Size	Deal Value
Data1	Data2	Data3	Data4	Data5	Data6	Data7	Data8	Data9	Data10

Fig. 10A

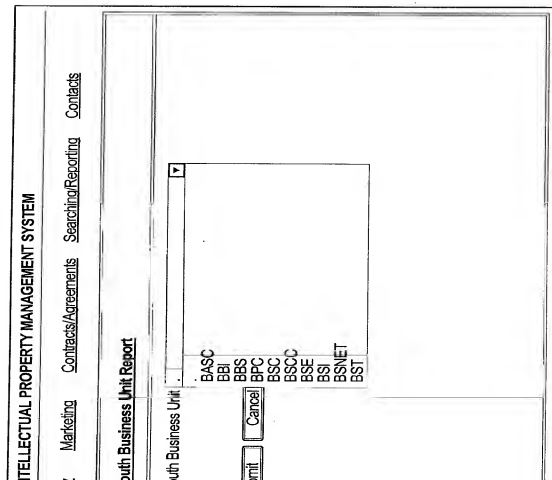

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Marketing Module
Create New Product
View/Edit Product
Search/Report Projects
Standard Project Reports
Top Deals
Customer Report
Remarketing Report
Status Level Report
BellSouth Entity Report
View/Edit Contacts
BellSouth Business Unit Report
BellSouth Business Unit
BASC
BBI
BBS
BPC
BSC
BSCC
BSE
BSI
BSNET
BST
Submit
Cancel

Fig. 109

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

Marketing Module

Create New Product

View/Edit Product

Search/Report Projects

Standard Project Reports

- Top Deals
- Customer Report
- Remarketing Report
- Status Level Report
- BellSouth Entity Report

View/Edit Contacts

BellSouth Business Unit Report

Entity Name	Status	Product Name	Customer Name	Remarketing Partner	Deal Value	BellSouth Contacts	BIPWARK Contact
Data1	Data2	Data3	Data4	Data5	Data6	Data7	Data8

Fig. 1111

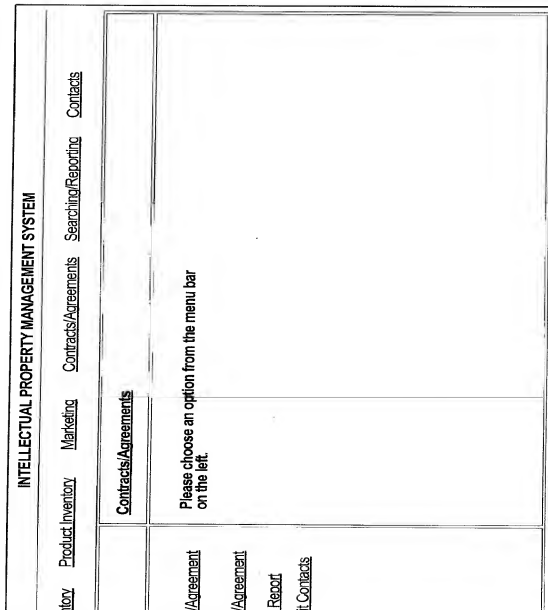

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contracts/Agreements
Add Contract/Agreement
Search Contract/Agreement
Contract Report
View/Edit Contacts
Please choose an option from the menu bar on the left.

Fig. III

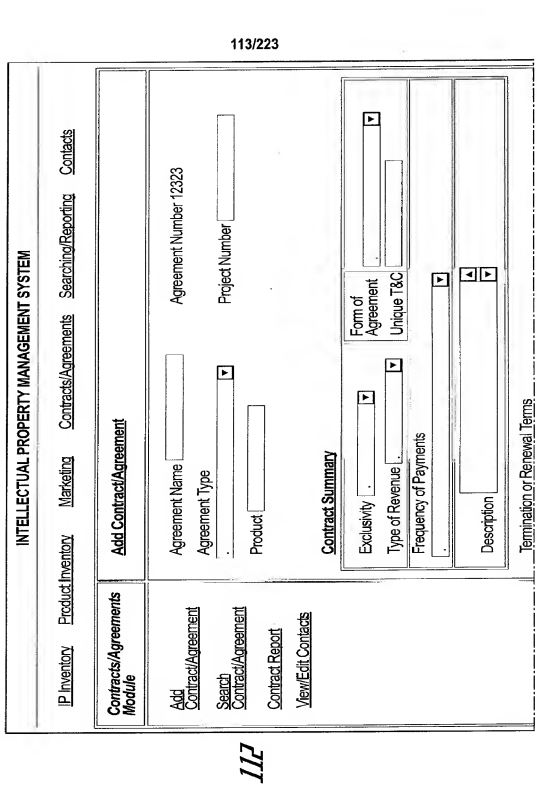

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contracts/Agreements Module
Add Contract/Agreement
Search Contract/Agreement
Contract Report
View/Edit Contacts
Add Contract/Agreement
Agreement Name
Agreement Number 12323
Agreement Type
Project Number
Product
Contract Summary
Exclusivity
Form of Agreement
Type of Revenue
Unique T&C
Frequency of Payments
Description
Termination or Renewal Terms

Fig. 112

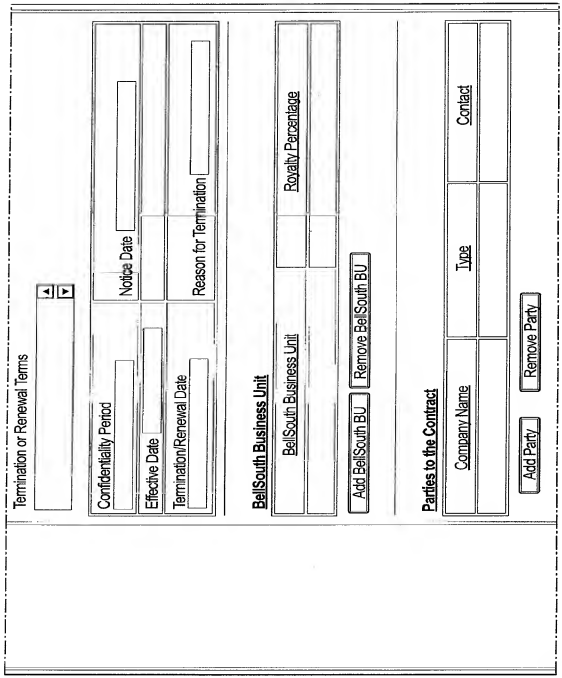

Termination or Renewal Terms
Confidentiality Period
Notice Date
Effective Date
Termination/Renewal Date
Reason for Termination
BellSouth Business Unit
BellSouth Business Unit
Royalty Percentage
Add BellSouth BU
Remove BellSouth BU
Parties to the Contract
Company Name
Type
Contact
Add Party
Remove Party

Fig. 11J

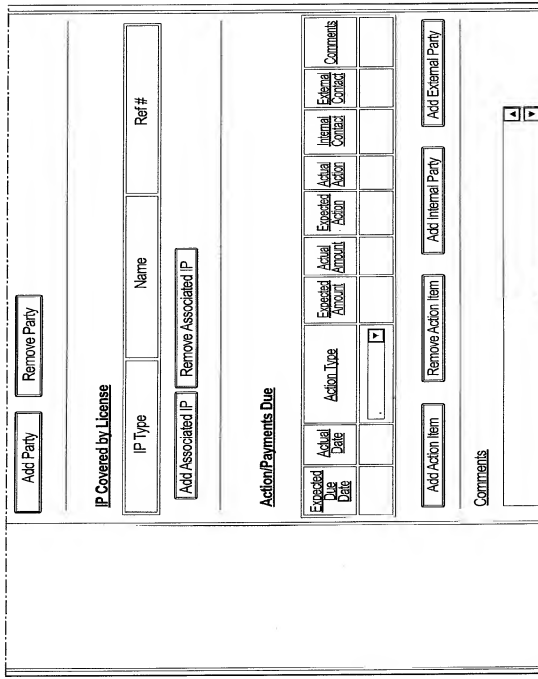

Add Party
Remove Party
IP Covered by License
IP Type
Name
Ref #
Add Associated IP
Remove Associated IP
Action/Payments Due
Expected Due Date
Actual Date
Action Type
Expected Amount
Actual Amount
Expected Action
Actual Action
Internal Contact
External Contact
Comments
Add Action Item
Remove Action Item
Add Internal Party
Add External Party
Comments

Fig. 114

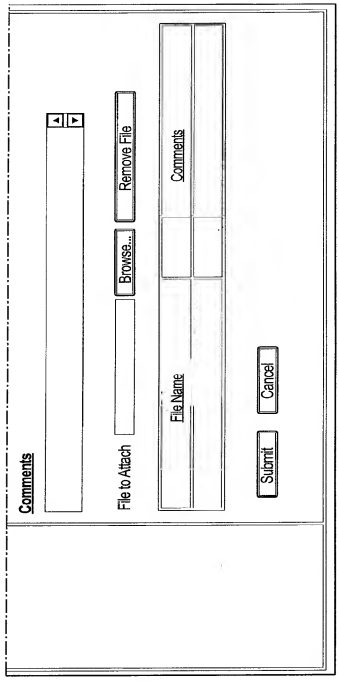

Comments
File to Attach
Browse...
Remove File
File Name
Comments
Submit
Cancel

Fig.115

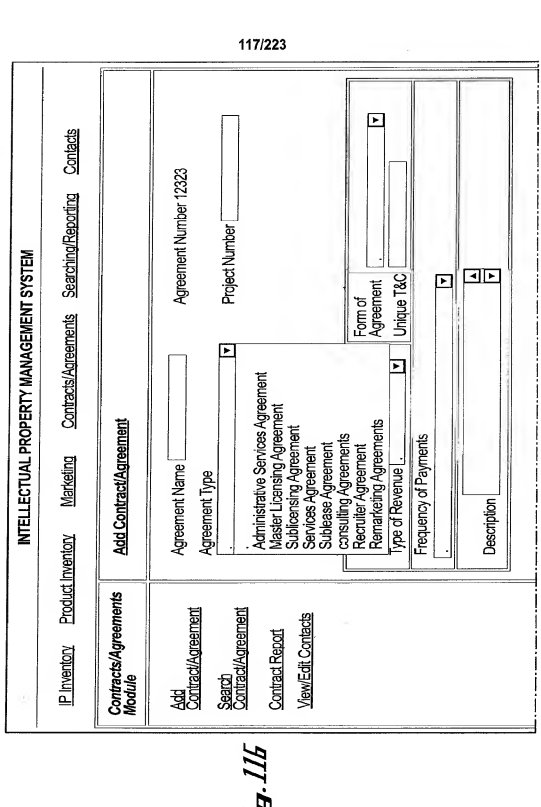

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contracts/Agreements Module
Add Contract/Agreement
Add Contract/Agreement
Search Contract/Agreement
Contract Report
View/Edit Contacts
Agreement Name
Agreement Number 12323
Agreement Type
Project Number
Administrative Services Agreement
Master Licensing Agreement
Sublicensing Agreement
Services Agreement
Sublease Agreement
consulting Agreements
Recruiter Agreement
Remarketing Agreements
Type of Revenue
Form of Agreement
Unique T&C
Frequency of Payments
Description

Fig. 11b

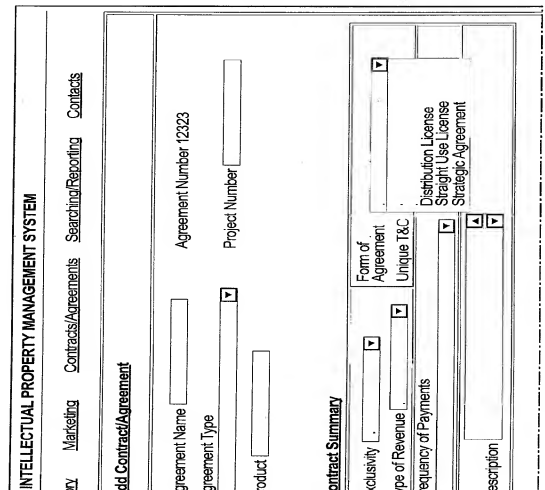

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contracts/Agreements Module
Add Contract/Agreement
Search Contract/Agreement
Contract Report
View/Edit Contacts
Add Contract/Agreement
Agreement Name
Agreement Type
Product
Agreement Number 12323
Project Number
Contract Summary
Exclusivity
Type of Revenue
Form of Agreement
Unique T&C
Distribution License
Straight Use License
Strategic Agreement
Frequency of Payments
Description

Fig. 111

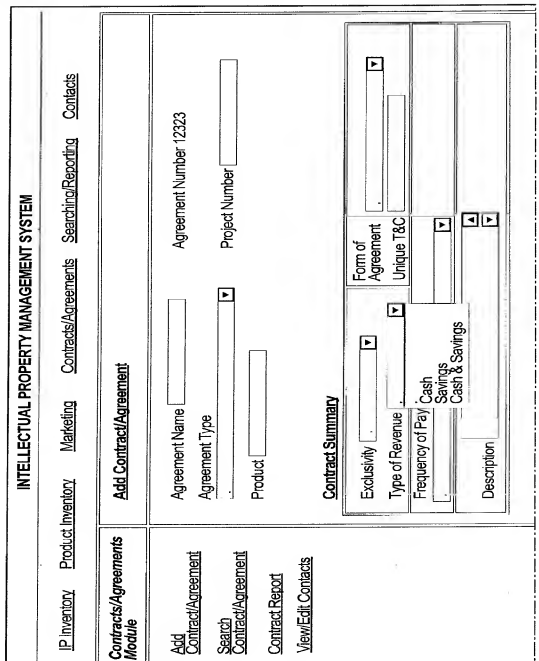

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contracts/Agreements Module
Add Contract/Agreement
Search Contract/Agreement
Contract Report
View/Edit Contacts
Add Contract/Agreement
Agreement Name
Agreement Number 12323
Agreement Type
Project Number
Product
Contract Summary
Exclusivity
Form of Agreement
Type of Revenue
Unique T&C
Frequency of Payi
Cash
Savings
Cash & Savings
Description

Fig. 11B

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contracts/Agreements Module
Add Contract/Agreement
Search Contract/Agreement
Contract Report
View/Edit Contacts
Add Contract/Agreement
Agreement Name
Agreement Number 12323
Agreement Type
Project Number
Product
Contract Summary
Exclusivity
Form of Agreement
Type of Revenue
Unique T&C
Frequency of Payments
One Time Development/Maintenance Savings
One Time Up-Front License Fee
One Time Up-Front License Fee w/Future royalties Due
Monthly Report/Royalty Payment
Quarterly Report/Royalty Payment
Annual Report/Royalty Payment

Fig. 119

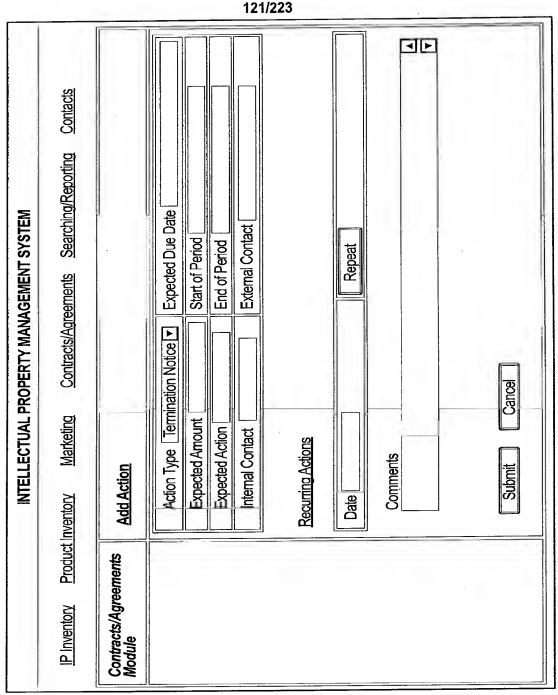

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contracts/Agreements Module
Add Action
Action Type
Termination Notice
Expected Due Date
Expected Amount
Start of Period
Expected Action
End of Period
Internal Contact
External Contact
Recurring Actions
Date
Repeat
Comments
Submit
Cancel

Fig. 12//

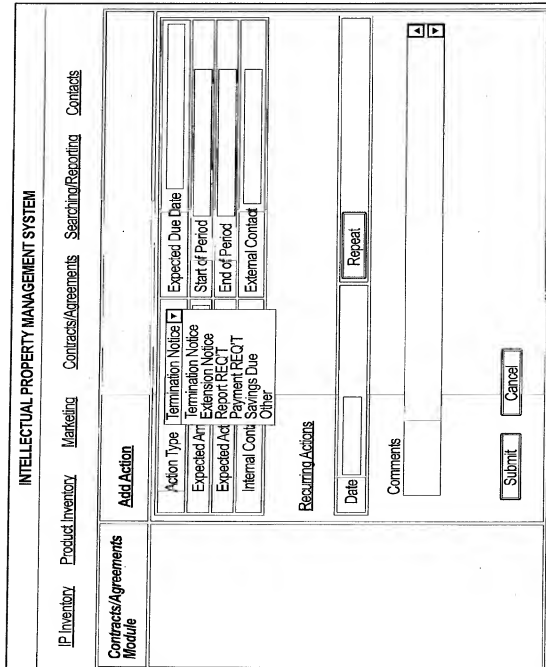

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contracts/Agreements Module
Add Action
Action Type
Termination Notice
Termination Notice
Extension Notice
Report REQ'T
Payment REQ'T
Savings Due
Other
Expected Due Date
Start of Period
End of Period
External Contact
Recurring Actions
Date
Repeat
Comments
Submit
Cancel

Fig. 12/H

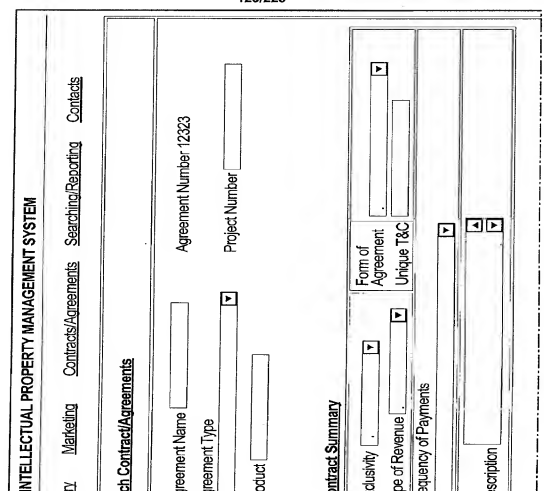

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contracts/Agreements Module
Add Contract/Agreement
Search Contract/Agreement
Contract Report
View/Edit Contacts
Search Contract/Agreements
Agreement Name
Agreement Number 12323
Agreement Type
Project Number
Product
Contract Summary
Exclusivity
Form of Agreement:
Type of Revenue
Unique T&C
Frequency of Payments
Description

Fig. 121

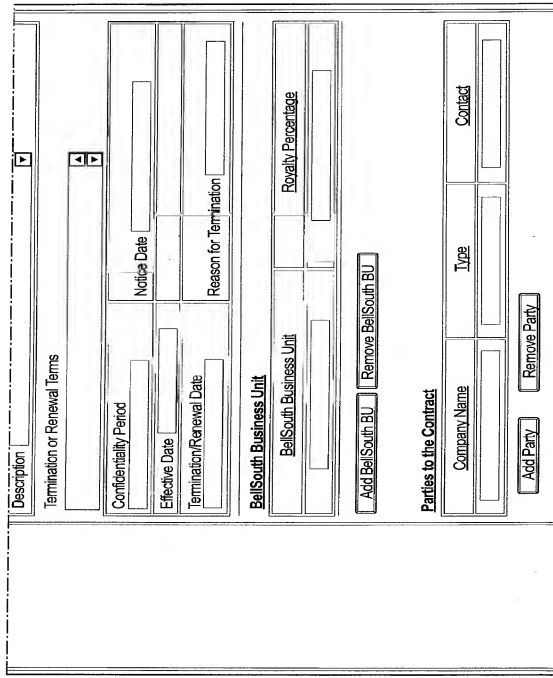

Description
Termination or Renewal Terms
Confidentiality Period
Notice Date
Effective Date
Termination/Renewal Date
Reason for Termination
BellSouth Business Unit
BellSouth Business Unit
Royalty Percentage
Add BellSouth BU
Remove BellSouth BU
Parties to the Contract
Company Name
Type
Contact
Add Party
Remove Party

Fig. 122

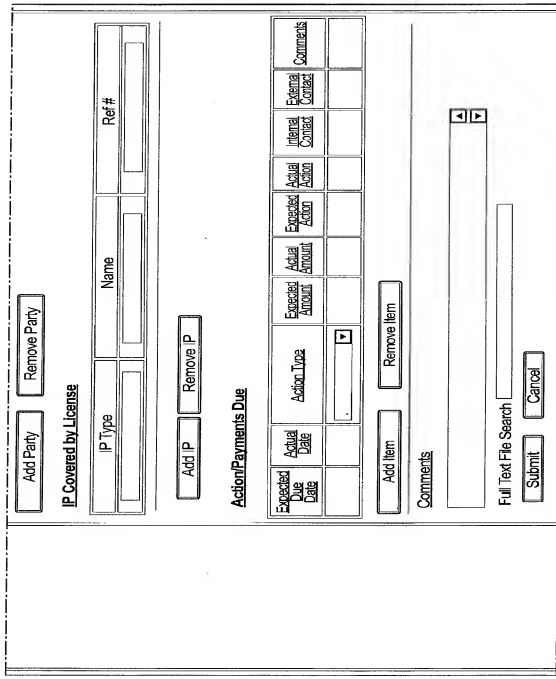

Add Party
Remove Party
IP Covered by License
IP Type
Name
Ref #
Add IP
Remove IP
Action/Payments Due
Expected Due Date
Actual Date
Action Type
Expected Amount
Actual Amount
Expected Action
Actual Action
Internal Contact
External Contact
Comments
Add Item
Remove Item
Comments
Full Text File Search
Submit
Cancel

Fig. 123

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

	Search Results			
Add Contract/Agreement Search Contract/Agreement Contract Report View/Edit Contacts	Agreement Name Data1	Agreement Number Data2	Agreement Type Data3	Project # Data4

Fig. 124

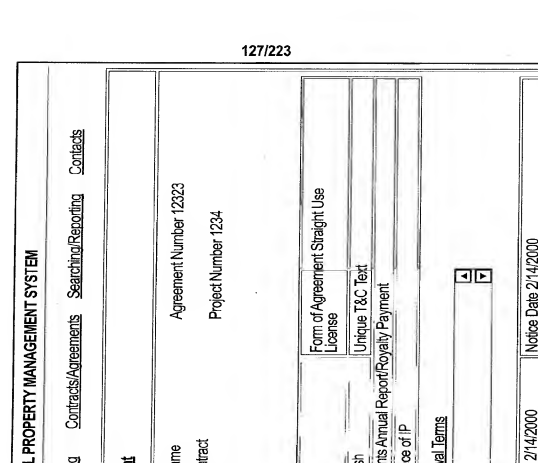

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contracts/Agreements Module
Add Contract/Agreement
Search Contract/Agreement
Contract Report
View/Edit Contacts
Contract/Agreement
Agreement Name Name
Agreement Number 12323
Agreement Type Contract
Project Number 1234
Product Product
Contract Summary
Exclusivity Exclusive
Form of Agreement Straight Use License
Type of Revenue Cash
Unique T&C Text
Frequency of Payments Annual Report/Royalty Payment
Description A nice piece of IP
Termination or Renewal Terms
Confidentiality Period 2/14/2000
Notice Date 2/14/2000

Fig. 12F

Confidentiality Period 2/14/2000	Notice Date 2/14/2000
Effective Date 2/14/2000	
Termination/Renewal Date 2/14/2000	Reason for Termination None

BellSouth Business Unit

BellSouth Business Unit		Royalty Percentage
Cellular		100

Parties to the Contract

Company Name	Type	Contact
Party	Remarking	Carter Pate

IP Covered by License

IP Type	Name	Ref #
Patent	Cell Phone	1234

Action/Payments Due

Fig. 12b

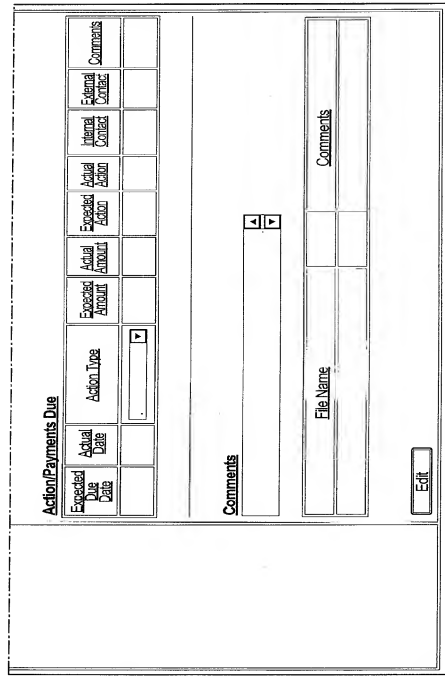

Action/Payments Due
Expected Due Date
Actual Date
Action Type
Expected Amount
Actual Amount
Expected Action
Actual Action
Internal Contact
External Contact
Comments
Comments
File Name
Comments
Edit

Fig. 127

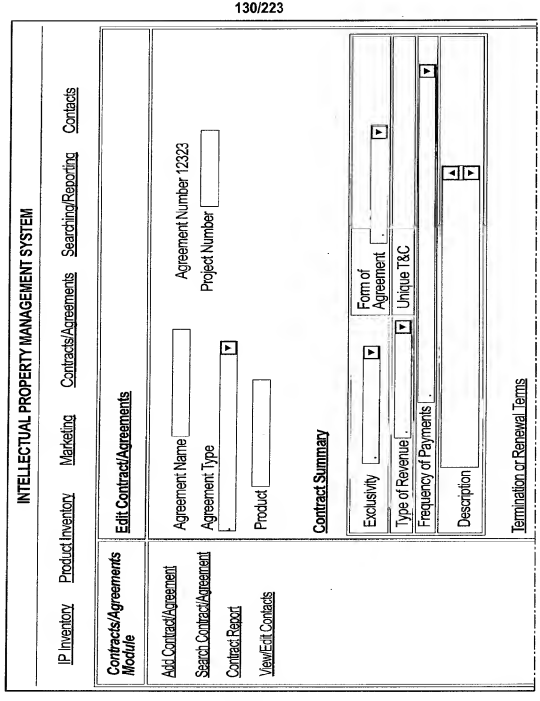

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contracts/Agreements Module
Add Contract/Agreement
Search Contract/Agreement
Contract Report
View/Edit Contacts
Edit Contract/Agreements
Agreement Name
Agreement Number 12323
Agreement Type
Project Number
Product
Contract Summary
Exclusivity
Form of Agreement
Type of Revenue
Unique T&C
Frequency of Payments
Description
Termination or Renewal Terms

Fig. 12H

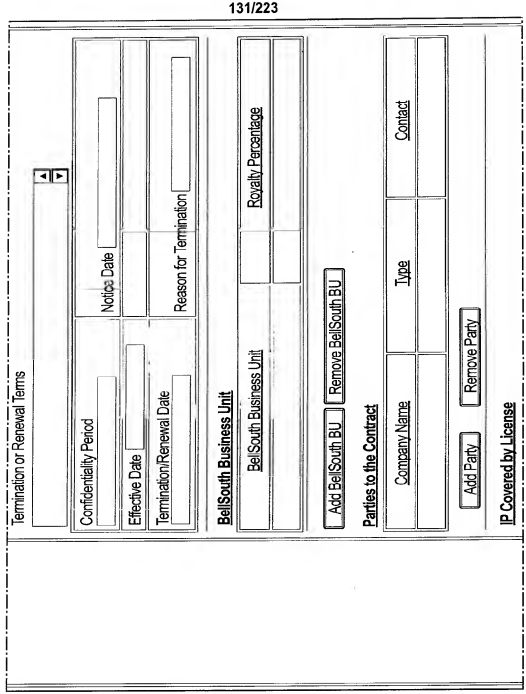

Termination or Renewal Terms
Confidentiality Period
Notice Date
Effective Date
Termination/Renewal Date
Reason for Termination
BellSouth Business Unit
BellSouth Business Unit
Royalty Percentage
Add BellSouth BU
Remove BellSouth BU
Parties to the Contract
Company Name
Type
Contact
Add Party
Remove Party
IP Covered by License

Fig. 129

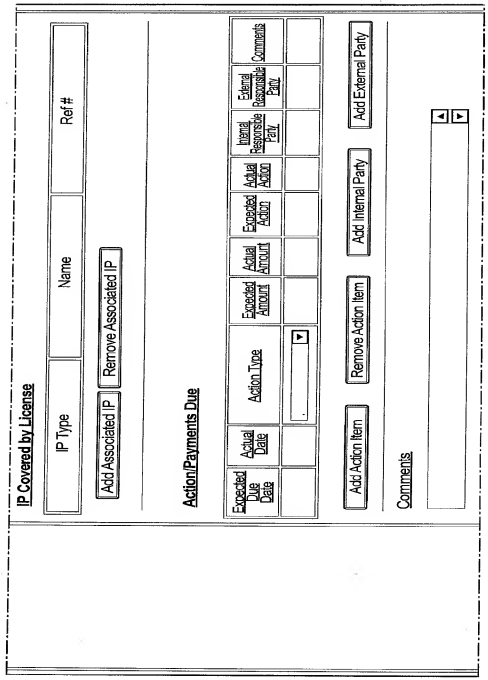

IP Covered by License
IP Type
Name
Ref #
Add Associated IP
Remove Associated IP
Action/Payments Due
Expected Due Date
Actual Date
Action Type
Expected Amount
Actual Amount
Expected Action
Actual Action
Internal Responsible Party
External Responsible Party
Comments
Add Action Item
Remove Action Item
Add Internal Party
Add External Party
Comments

Fig. 13J

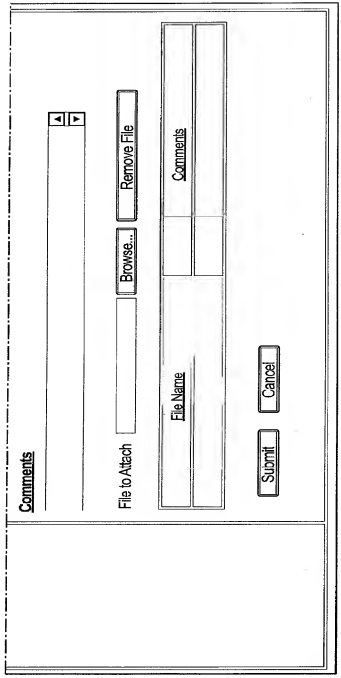

Comments
File to Attach
Browse...
Remove File
File Name
Comments
Submit
Cancel

Fig. 131

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Invencny | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

Contracts/Agreements Module	**Contracts Reports**
Add Contract/Agreement Search Contract/Agreement Contract Report Upcoming Termination Report Royalty/Reporting Requirements By Date Contracts By BellSouth Business Unit Financial Report By Period	**Please select a report from the left menu bar.**

Fig. 132

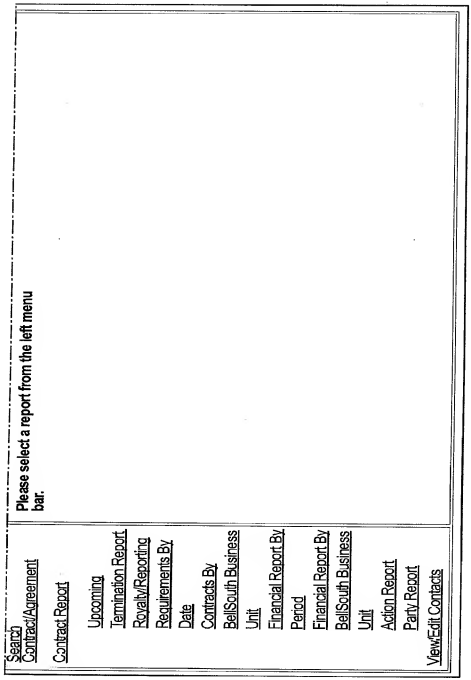

Search Contract/Agreement
Contract Report
Uncoming Termination Report
Royalty/Reporting Requirements By Date
Contracts By BellSouth Business Unit
Financial Report By Period
Financial Report By BellSouth Business Unit
Action Report
Party Report
View/Edit Contacts
Please select a report from the left menu bar.

Fig. 133

Fig. 134

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

Contracts/Agreements Module

Add Contract/Agreement

Search Contract/Agreement

Contract Report

Upcoming Termination Report

Royalty/Reporting Requirements By Date

Contracts By BellSouth Business Unit

Financial Report By Period

Upcoming Termination Report

Agreement Type

Period Covered By Report:

Start Date _____ End Date _____

OR

Time Period _____

Search | Cancel

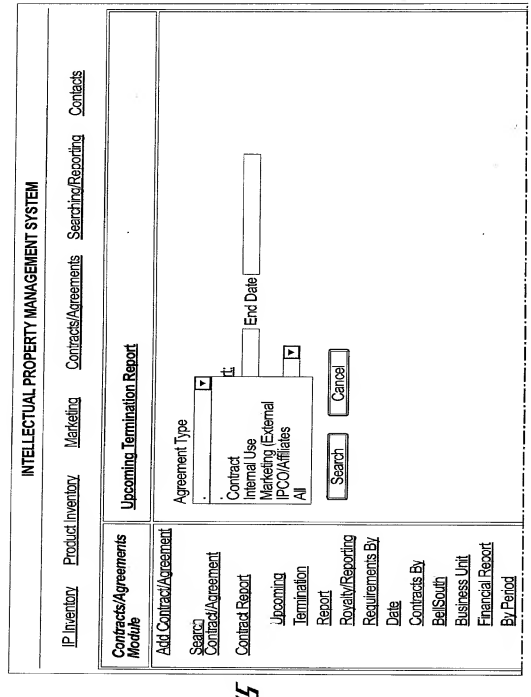

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contracts/Agreements Module
Add Contract/Agreement
Search Contract/Agreement
Contract Report
Upcoming Termination Report
Royalty/Reporting Requirements By Date
Contracts By BellSouth Business Unit
Financial Report By Period
Upcoming Termination Report
Agreement Type
Contract
Internal Use
Marketing (External
IPCO/Affiliates
All
End Date
Search
Cancel

Fig. 135

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contracts/Agreements Module
Add Contract/Agreement
Search Contract/Agreement
Contract Report
Upcoming Termination Report
Royalty/Reporting Requirements By Date
Contracts By BellSouth Business Unit
Financial Report By Period
Upcoming Termination Report
Agreement Type
Period Covered By Report:
Start Date
End Date
OR
Time Period
Search
Next 30 Days
Next 60 Days
Next Year

Fig. 136

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

Contracts/Agreements Module

Add Contract/Agreement

Search Contract/Agreement

Contract Report

Upcoming Termination Report

Royalty/Reporting Requirements By Date

Contracts By BellSouth Business Unit

Financial Report By Period

Upcoming Termination Report

Effective Date	Notice Date	Termination Date	Contract Name	Contract #	Customer
Data1	Data2	Data3	Data4	Data5	Data6

Fig. 137

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contracts/Agreements Module
Add Contract/Agreement
Search Contract/Agreement
Contract Report
Upcoming Termination Report
Royalty/Reporting Requirements By Date
Contracts By BellSouth Business Unit
Financial Report By Period
Royalty/Report Requirements By Date Report
Agreement Type
Period Covered By Report:
Start Date
End Date
OR
Time Period
Search
Cancel

Fig. 13H

Fig. 139

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

Contracts/Agreements Module

Add Contract/Agreement

Search Contract/Agreement

Contract Report

Upcoming Termination Report

Royalty/Reporting Requirements By Date

Contracts By BellSouth Business Unit

Financial Report By Period

Financial Report By BellSouth Business Unit

Action Report

Royalty/Report Requirements By Date Report

Contract Name	Expected Action Due Date	Actual Action Date	Action Type	Expected Amount	Actual Amount	Expected Action	Actual Action
Data	Data	Data	Data	Data	Data	Data	Data

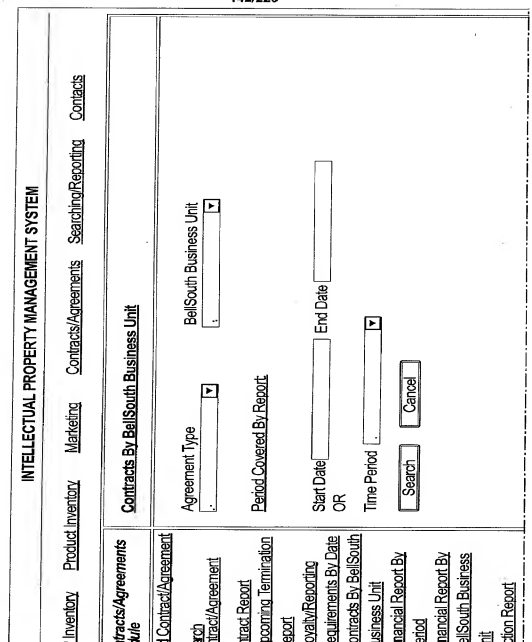

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contracts/Agreements Module
Add Contract/Agreement
Search Contract/Agreement
Contract Report
Upcoming Termination Report
Royalty Reporting Requirements By Date
Contracts By BellSouth Business Unit
Financial Report By Period
Financial Report By BellSouth Business Unit
Action Report
Contracts By BellSouth Business Unit
Agreement Type
BellSouth Business Unit
Period Covered By Report:
Start Date
End Date
OR
Time Period
Search
Cancel

Fig. 14J

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

Contracts/Agreements Module

Add Contract/Agreement

Search Contract/Agreement

Contract Report

Upcoming Termination Report

Royalty/Reporting Requirements By Date

Contracts By BellSouth Business Unit

Financial Report By Period

Financial Report By BellSouth Business Unit

Action Report

Royalty/Report Requirements By Date

Period Covered By Report: Date Report Run:

BellSouth Business Unit	Agreement Name	Product	Parties	Effective Date	Termination Date
Data	Data	Data	Data	Data	Data

Fig. 141

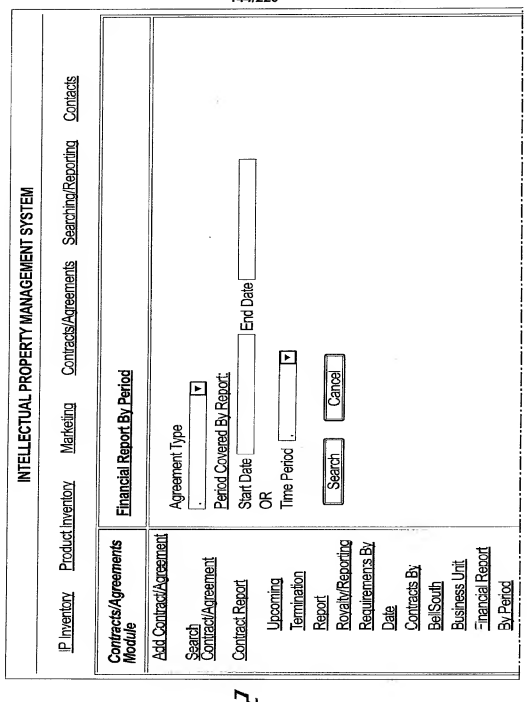

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contracts/Agreements Module
Add Contract/Agreement
Search Contract/Agreement
Contract Report
Upcoming Termination Report
Royalty/Reporting Requirements By Date
Contracts By: BellSouth Business Unit -nancial Report By Period
Financial Report By: Period
Agreement Type
Period Covered By Report:
Start Date
End Date
OR
Time Period
Search
Cancel

Fig. 142

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

Contracts/Agreements Module

Add Contract/Agreement

Search Contract/Agreement

Contract Report

Upcoming Termination Report

Royalty/Reporting Requirements By Date

Contracts By BellSouth Business Unit

Financial Report By Period

Financial Report By BellSouth Business Unit

Action Report

Financial Report By Period

Period Covered By Report: Date Report Run:

Contract Name	BellSouth Business Unit	Parties	Amount Due	Date Due	External Contact
Data	Data	Data	Data	Data	Data

Fig. 14J

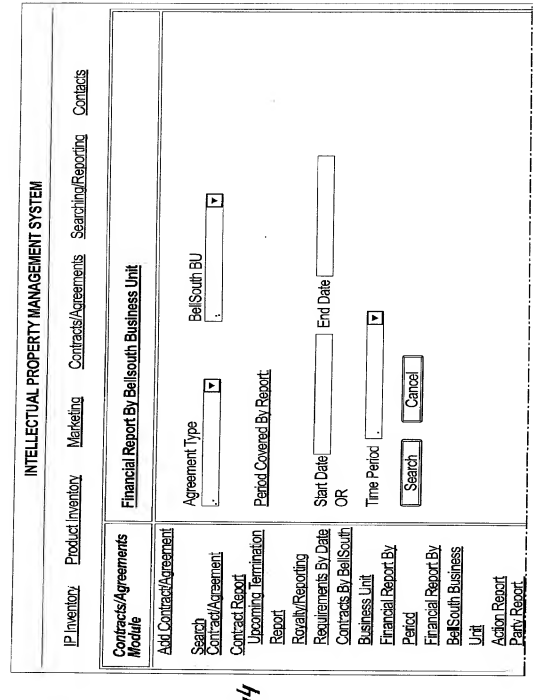

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contracts/Agreements Module
Financial Report By Bellsouth Business Unit
Add Contract/Agreement
Search Contract/Agreement
Contract Report
Upcoming Termination Report
Royalty/Reporting Requirements By Date
Contracts By BellSouth Business Unit
Financial Report By Period
Financial Report By BellSouth Business Unit
Adion Report
Party Report
Agreement Type
BellSouth BU
Period Covered By Report
Start Date
End Date
OR
Time Period
Search
Cancel

Fig. 144

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

Contracts/Agreements Module

- Add Contract/Agreement
- Search Contract/Agreement
- Contract Report
- Upcoming Termination Report
- Royalty/Reporting Requirements By Date
- Contracts By BellSouth Business Unit
- Financial Report By Period
- Financial Report By BellSouth Business Unit
- Action Report

Financial Report By Bellsouth Business Unit

Period Covered By Report: Date Report Run:

Parties	BellSouth Business Unit	Agreement Name	Expected Amount	Actual Amount	Date Due	External Contact
Data	Data	Data	Data	Data	Data	Data

Fig. 145

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contracts/Agreements Module
Add Contract/Agreement
Search Contract/Agreement
Contract Report
Upcoming Termination Report
Royalty/Reporting Requirements By Date
Contracts By BellSouth Business Unit
Financial Report By Period
Financial Report By BellSouth Business Unit
Action Report
Action Report
Agreement Type
Action Type
Period Covered By Report:
Start Date
End Date
OR
Time Period
Sort By:
Sort 1:
Sort 2:
Sort 3:
Search
Cancel

Fig. 146

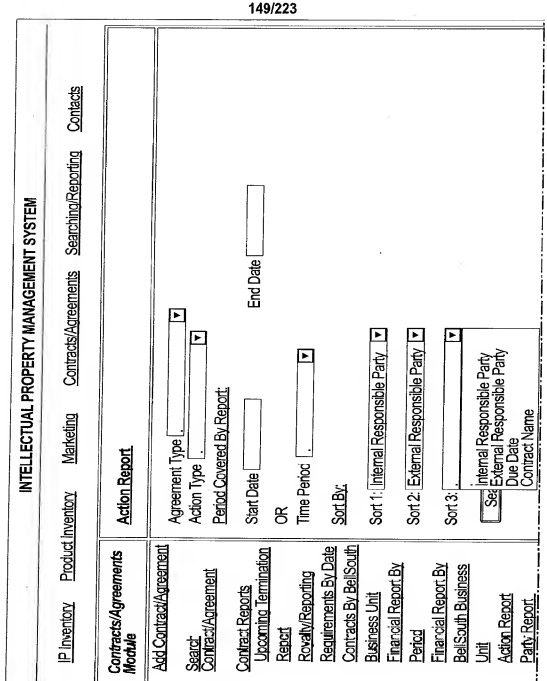

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contracts/Agreements Module
Add Contract/Agreement
Search Contract/Agreement
Contract Reports
Upcoming Termination Report
Royalty/Reporting Requirements By Date
Contracts By BellSouth Business Unit
Financial Report By Period
Financial Report By BellSouth Business Unit
Action Report
Party Report
Action Report
Agreement Type
Action Type
Period Covered By Report:
Start Date
End Date
OR
Time Period
Sort By:
Sort 1: Internal Responsible Party
Sort 2: External Responsible Party
Sort 3:
Internal Responsible Party
External Responsible Party
Due Date
Contract Name
Set

Fig. 147

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

Contracts/Agreements Module

Add Contract/Agreement

Search Contract/Agreement

Contract Reports

- Upcoming Termination Report
- Royalty/Reporting Requirements By Date
- Contracts By BellSouth Business Unit
- Financial Report By Period
- Financial Report By BellSouth Business Unit
- Action Report
- Party Report

Action Report

Period Covered By Report: Date Report Run:

Expected Due Date	Agreement Name	Action Type	Expected Action	Expected Amount	Internal Contact	External Contact
Data	Data	Data	Data	Data	Data	Data

Fig. 14B

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contracts/Agreements Module
Party Report
Add Contract/Agreement
Search Contract/Agreements
Contract Reports
Upcoming Termination Report
Royalty/Reporting Requirements By Date
Contracts By BellSouth Business Unit
Financial Report By Period
Agreement Type
Parties
Add Party
Period Covered By Report:
Start Date
End Date
OR
Time Period
Search
Cancel

Fig. 149

Fig. 15I

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

Contracts/Agreements Module

Add Contract/Agreement

Search Contract/Agreements

Contract Reports

- Upcoming Termination Report
- Royalty/Reporting Requirements By Date
- Contracts By Bel South Business Unit
- Financial Report By Period

Party Report

Period Covered By Report: Date Report Run:

Parties	Agreement Name	BellSouth Business Unit	Amount Due	Date Due	External Contact
Data	Data	Data	Data	Data	Data

Fig. 151

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

Searching/Reporting Module	
Contract Reports Upcoming Termination Report Royalty/Reporting Requirements By Date Contracts By BellSouth Business Entity Report Financial Report By Period Financial Report By BellSouth Entity Action Report Party Report **Standard Project Reports** Top Deals Customer Report Remarketing Report Status Level Report BellSouth Entity Report	**Cross Module Searching**

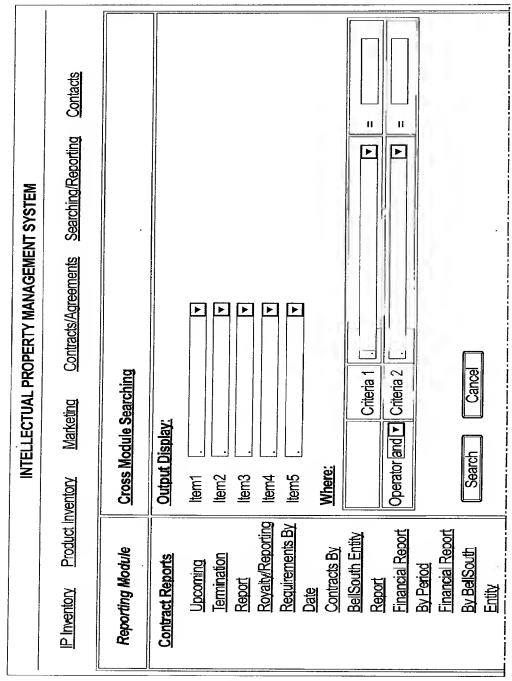

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Reporting Module
Contract Reports
Uncoming Termination Report
Royalty/Reporting Requirements By Date
Contracts By: BellSouth Entity Report
Financia Report By Period
Financial Report By BellSouth Entity
Cross Module Searching
Output Display:
Item1
Item2
Item3
Item4
Item5
Where:
Criteria 1
Operator and
Criteria 2
=
=
Search
Cancel

Fig. 152

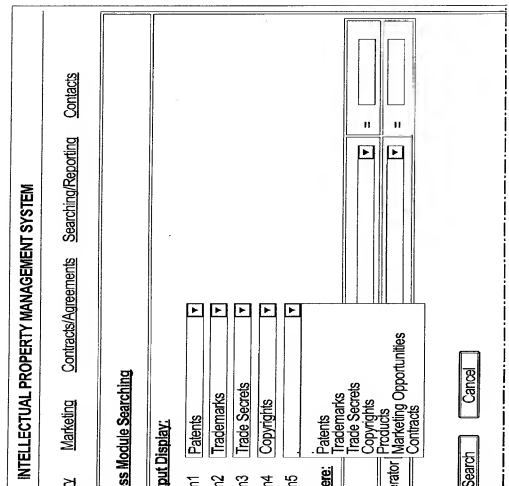

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Reporting Module
Cross Module Searching
Contract Reports
Upcoming Termination Report
Royalty/Reporting Requirements By Date
Contracts By BellSouth Entity Report
Financial Report By Period
Financial Report By BellSouth Entity
Output Display:
Item1
Item2
Item3
Item4
Item5
Patents
Trademarks
Trade Secrets
Copyrights
Where:
Patents
Trademarks
Trade Secrets
Copyrights
Products
Marketing Opportunities
Contracts
Operator
=
=
Search
Cancel

Fig. 153

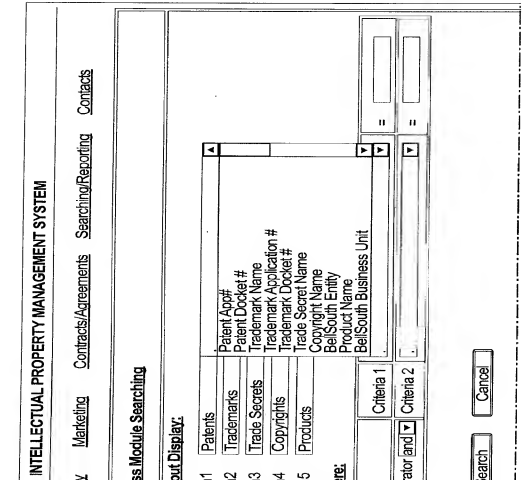

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Reporting Module
Cross Module Searching
Contract Reports
Upcoming Termination Report
Royalty/Reporting Requirements By Date
Contracts By BellSouth Entity Report
Financial Report By Period
Financial Report By BellSouth Entity
Output Display:
Item1
Item2
Item3
Item4
Item5
Patents
Trademarks
Trade Secrets
Copyrights
Products
Patent App#
Patent Docket #
Trademark Name
Trademark Application #
Trademark Docket #
Trade Secret Name
Copyright Name
BellSouth Entity
Product Name
BellSouth Business Unit
Where:
Criteria 1
Operator and
Criteria 2
=
=
Search
Cancel

Fig. 154

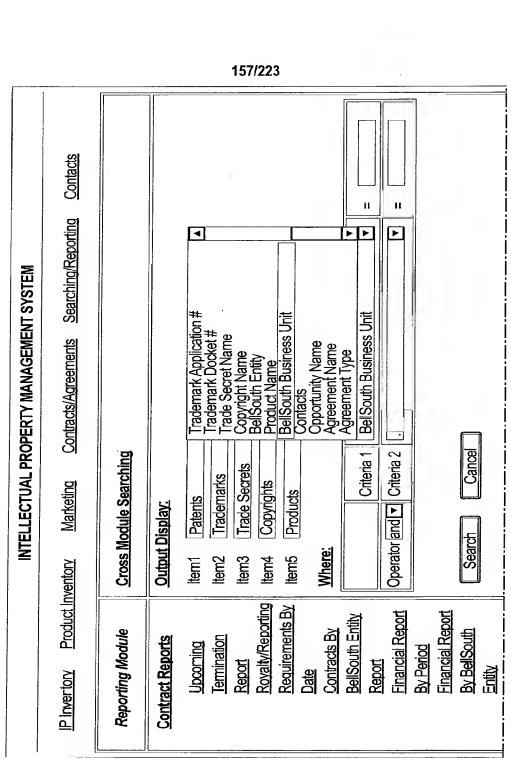

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Reporting Module
Cross Module Searching
Contract Reports
Upcoming Termination Report
Royalty/Reporting Requirements By Date
Contracts By BellSouth Entity Report
Financial Report By Period
Financial Report By BellSouth Entity
Output Display:
Item1
Item2
Item3
Item4
Item5
Patents
Trademarks
Trade Secrets
Copyrights
Products
Trademark Application #
Trademark Docket #
Trade Secret Name
Copyright Name
BellSouth Entity
Product Name
BellSouth Business Unit
Contacts
Opportunity Name
Agreement Name
Agreement Type
Where:
Criteria 1
BellSouth Business Unit
=
Operator
and
Criteria 2
=
Search
Cancel

Fig. 155

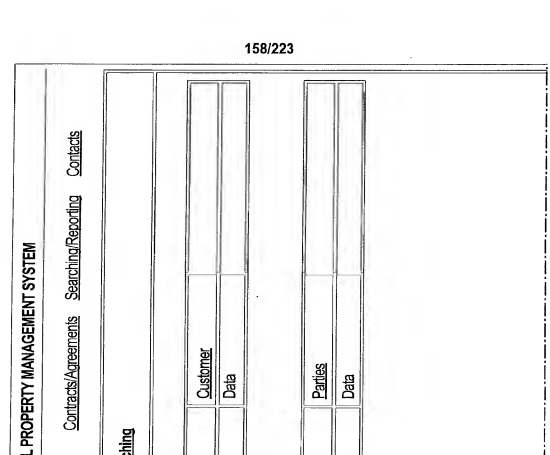

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Reporting Module
Cross Module Searching
Contract Reports
Upcoming Termination Report
Royalty Reporting
Requirements By Date
Contracts By BellSouth Entity Report
Financial Report By Period
Financial Report By BellSouth Entity
Action Report
Party Report
Standard Project Reports
Top Deals
Marketing
Name
Customer
Data
Data
Contracts
Name
Parties
Data
Data

Fig. 15b

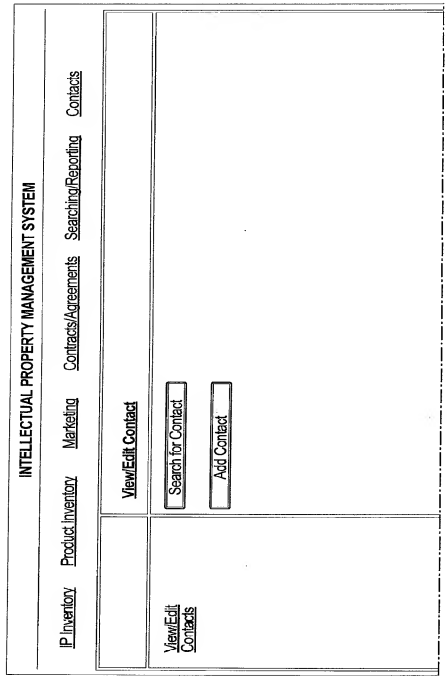

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
View/Edit Contacts
View/Edit Contact
Search for Contact
Add Contact

Fig. 157

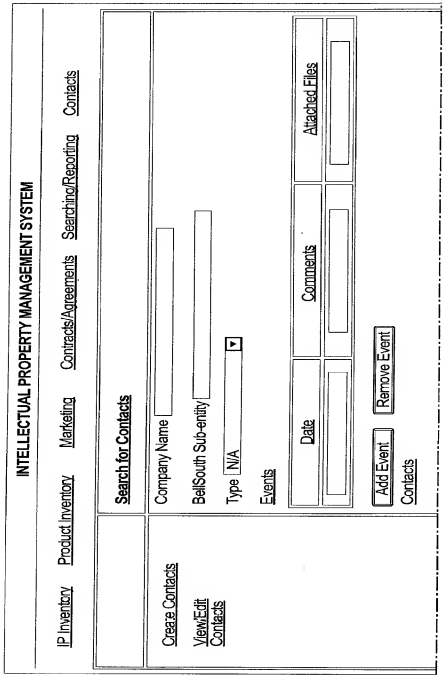

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Create Contacts
View/Edit Contacts
Search for Contacts
Company Name
BellSouth Sub-entity
Type N/A
Events
Date
Comments
Attached Files
Add Event
Remove Event
Contacts

Fig. 15B

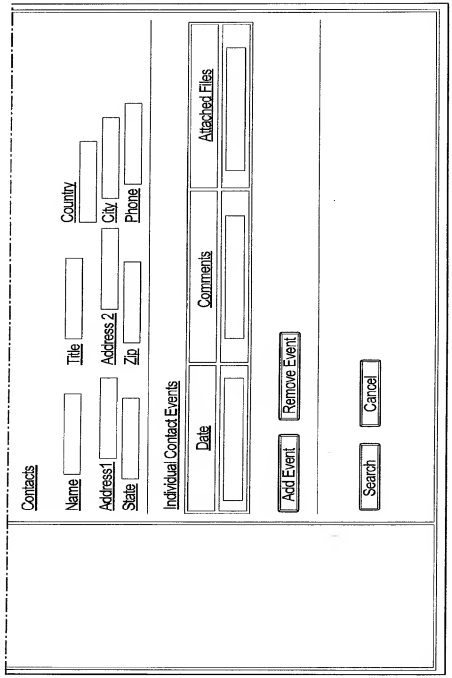

Contacts
Name
Title
Country
Address1
Address 2
City
State
Zip
Phone
Individual Contact Events
Date
Comments
Attached Files
Add Event
Remove Event
Search
Cancel

Fig. 159

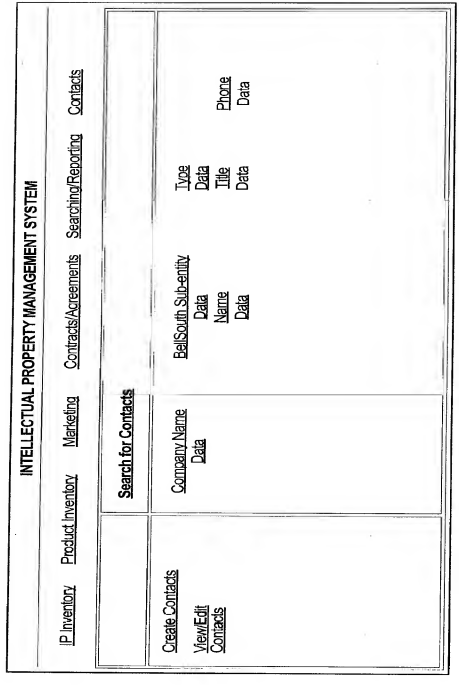

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Create Contacts
View/Edit Contacts
Search for Contacts
Company Name Data
BellSouth Sub-entity Data
Name Data
Type Data
Title Data
Phone Data

Fig. 15II

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Create Contacts
View/Edit Contacts
View/Edit Individual Contact
Name Carter Pete
Address1 123 Smith Ave.
State NJ
Title Associate
Address 2
Zip 07000
Country USE
City New York
Phone 201-596-8000
Individual Contact Events
Date
2/20/2000
Comments
Meeting with Tom
Attached Files
presentation.doc
Edit

Fig. 161

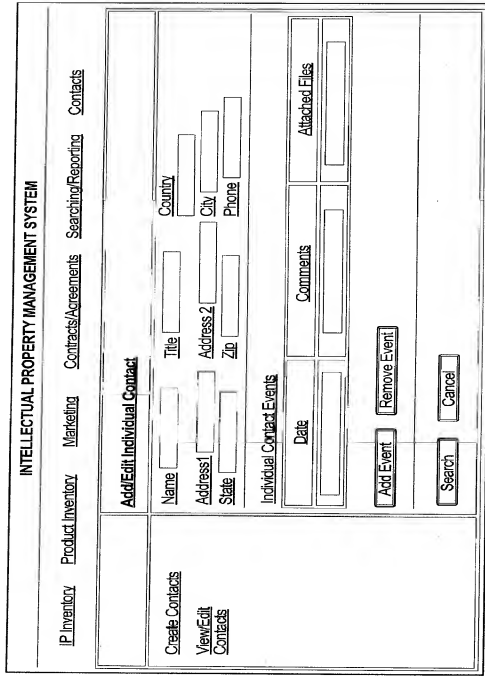

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Create Contacts
View/Edit Contacts
Add/Edit Individual Contact
Name
Title
Country
Address1
Address 2
City
State
Zip
Phone
Individual Contact Events
Date
Comments
Attached Files
Add Event
Remove Event
Search
Cancel

Fig. 152

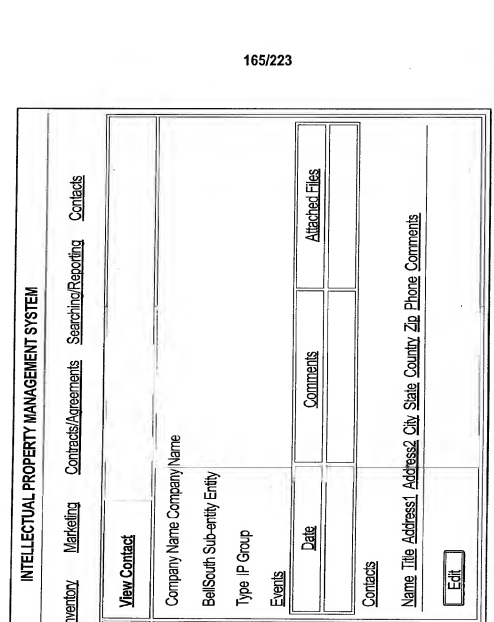

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Create Contacts
View/Edit Contacts
View Contact
Company Name Company Name
BellSouth Sub-entity Entity
Type IP Group
Events
Date
Comments
Attached Files
Contacts
Name Title Address1 Address2 City State Country Zip Phone Comments
Edit

Fig. 163

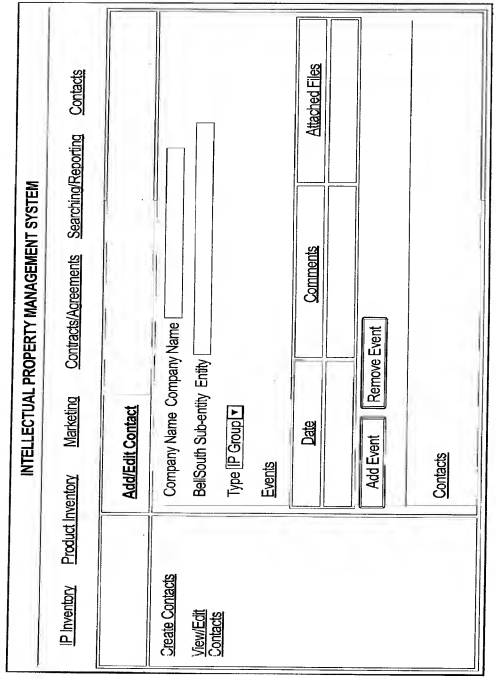

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Create Contacts
View/Edit Contacts
Add/Edit Contact
Company Name Company Name
BellSouth Sub-entity Entity
Type IP Group
Events
Date
Comments
Attached Files
Add Event
Remove Event
Contacts

Fig. 164

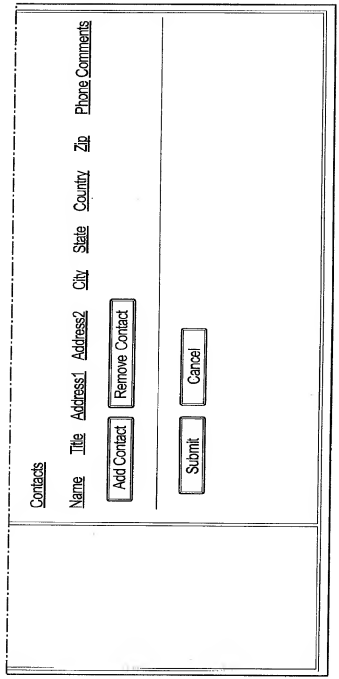

Contacts
Name
Title
Address1
Address2
City
State
Country
Zip
Phone
Comments
Add Contact
Remove Contact
Submit
Cancel

Fig. 165

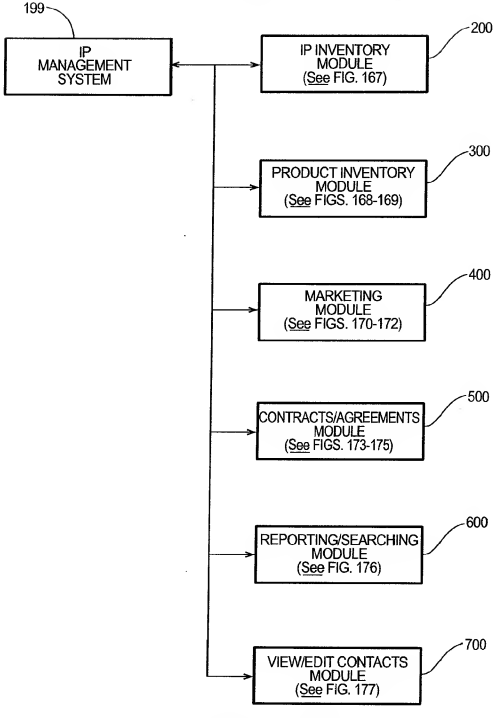

199
IP MANAGEMENT SYSTEM
IP INVENTORY MODULE (See FIG. 167)
200
PRODUCT INVENTORY MODULE (See FIGS. 168-169)
300
MARKETING MODULE (See FIGS. 170-172)
400
CONTRACTS/AGREEMENTS MODULE (See FIGS. 173-175)
500
REPORTING/SEARCHING MODULE (See FIG. 176)
600
VIEW/EDIT CONTACTS MODULE (See FIG. 177)
700

Fig. 166

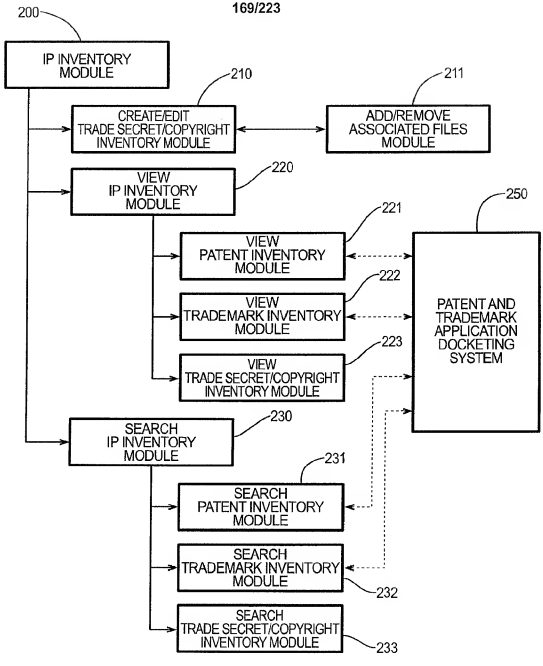

200
IP INVENTORY MODULE
210
CREATE/EDIT TRADE SECRET/COPYRIGHT INVENTORY MODULE
211
ADD/REMOVE ASSOCIATED FILES MODULE
220
VIEW IP INVENTORY MODULE
221
VIEW PATENT INVENTORY MODULE
222
VIEW TRADEMARK INVENTORY MODULE
223
VIEW TRADE SECRET/COPYRIGHT INVENTORY MODULE
250
PATENT AND TRADEMARK APPLICATION DOCKETING SYSTEM
230
SEARCH IP INVENTORY MODULE
231
SEARCH PATENT INVENTORY MODULE
SEARCH TRADEMARK INVENTORY MODULE
232
SEARCH TRADE SECRET/COPYRIGHT INVENTORY MODULE
233

Fig. 167

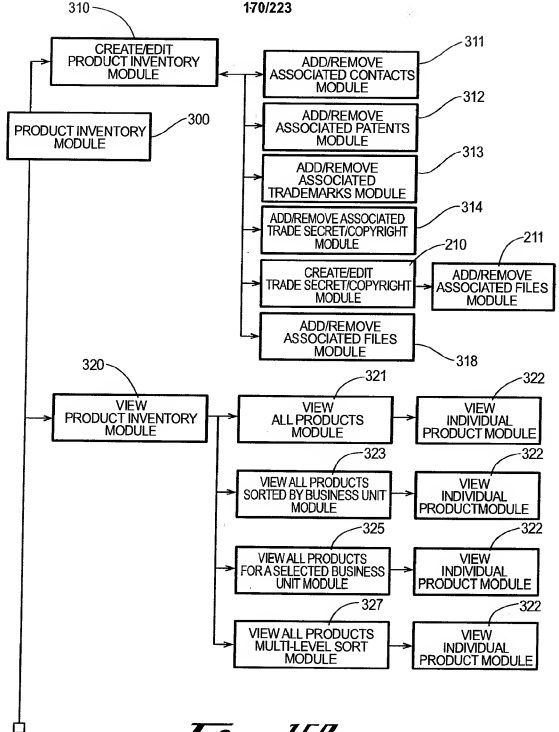

310
CREATE/EDIT PRODUCT INVENTORY MODULE
PRODUCT INVENTORY MODULE
300
ADD/REMOVE ASSOCIATED CONTACTS MODULE
311
ADD/REMOVE ASSOCIATED PATENTS MODULE
312
ADD/REMOVE ASSOCIATED TRADEMARKS MODULE
313
ADD/REMOVE ASSOCIATED TRADE SECRET/COPYRIGHT MODULE
314
CREATE/EDIT TRADE SECRET/COPYRIGHT MODULE
210
ADD/REMOVE ASSOCIATED FILES MODULE
211
ADD/REMOVE ASSOCIATED FILES MODULE
318
320
VIEW PRODUCT INVENTORY MODULE
VIEW ALL PRODUCTS MODULE
321
VIEW INDIVIDUAL PRODUCT MODULE
322
VIEW ALL PRODUCTS SORTED BY BUSINESS UNIT MODULE
323
VIEW INDIVIDUAL PRODUCTMODULE
322
VIEW ALL PRODUCTS FOR A SELECTED BUSINESS UNIT MODULE
325
VIEW INDIVIDUAL PRODUCT MODULE
322
VIEW ALL PRODUCTS MULTI-LEVEL SORT MODULE
327
VIEW INDIVIDUAL PRODUCT MODULE
322
168A

Fig. 168

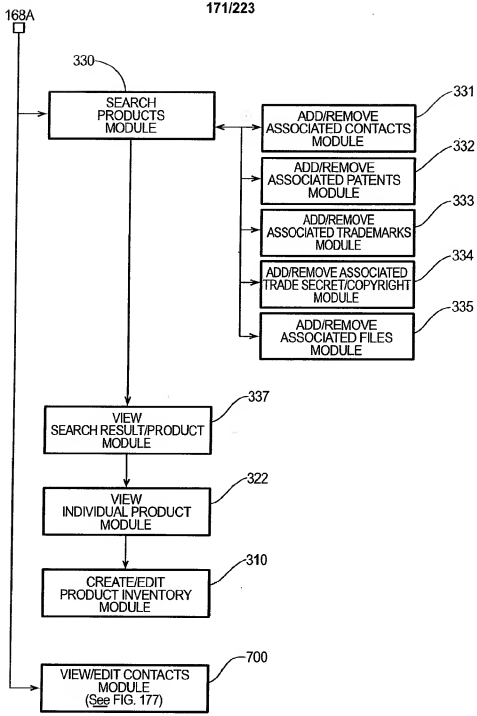

168A
330
SEARCH PRODUCTS MODULE
331
ADD/REMOVE ASSOCIATED CONTACTS MODULE
332
ADD/REMOVE ASSOCIATED PATENTS MODULE
333
ADD/REMOVE ASSOCIATED TRADEMARKS MODULE
334
ADD/REMOVE ASSOCIATED TRADE SECRET/COPYRIGHT MODULE
335
ADD/REMOVE ASSOCIATED FILES MODULE
337
VIEW SEARCH RESULT/PRODUCT MODULE
322
VIEW INDIVIDUAL PRODUCT MODULE
310
CREATE/EDIT PRODUCT INVENTORY MODULE
700
VIEW/EDIT CONTACTS MODULE (See FIG. 177)

Fig. 169

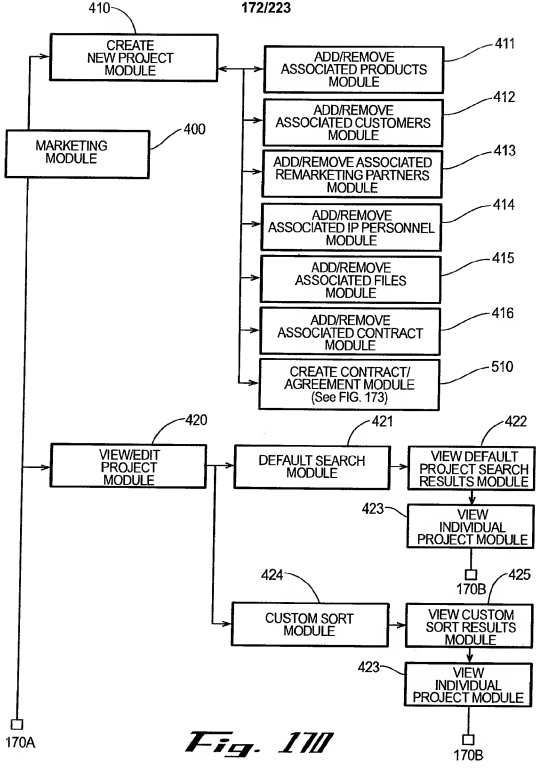

410
CREATE NEW PROJECT MODULE
ADD/REMOVE ASSOCIATED PRODUCTS MODULE
411
ADD/REMOVE ASSOCIATED CUSTOMERS MODULE
412
MARKETING MODULE
400
ADD/REMOVE ASSOCIATED REMARKETING PARTNERS MODULE
413
ADD/REMOVE ASSOCIATED IP PERSONNEL MODULE
414
ADD/REMOVE ASSOCIATED FILES MODULE
415
ADD/REMOVE ASSOCIATED CONTRACT MODULE
416
CREATE CONTRACT/ AGREEMENT MODULE (See FIG. 173)
510
420
VIEW/EDIT PROJECT MODULE
421
DEFAULT SEARCH MODULE
422
VIEW DEFAULT PROJECT SEARCH RESULTS MODULE
423
VIEW INDIVIDUAL PROJECT MODULE
170B
424
425
CUSTOM SORT MODULE
VIEW CUSTOM SORT RESULTS MODULE
423
VIEW INDIVIDUAL PROJECT MODULE
170A
170B

Fig. 17B

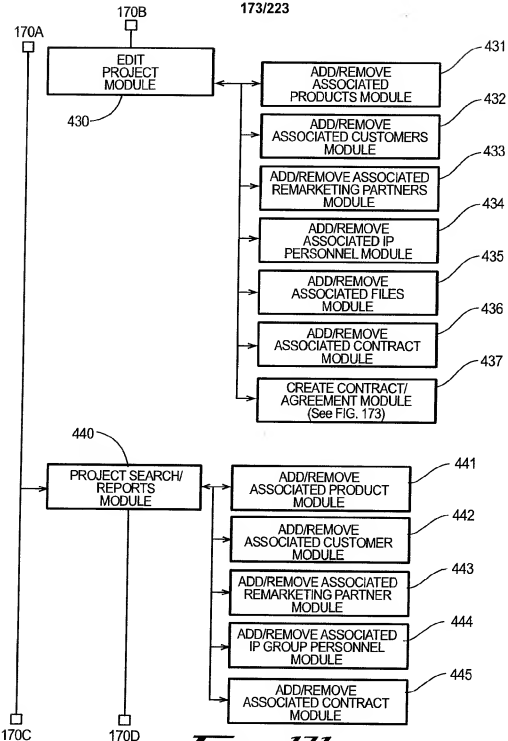

170A
170B
EDIT PROJECT MODULE
430
ADD/REMOVE ASSOCIATED PRODUCTS MODULE
431
ADD/REMOVE ASSOCIATED CUSTOMERS MODULE
432
ADD/REMOVE ASSOCIATED REMARKETING PARTNERS MODULE
433
ADD/REMOVE ASSOCIATED IP PERSONNEL MODULE
434
ADD/REMOVE ASSOCIATED FILES MODULE
435
ADD/REMOVE ASSOCIATED CONTRACT MODULE
436
CREATE CONTRACT/ AGREEMENT MODULE (See FIG. 173)
437
440
PROJECT SEARCH/ REPORTS MODULE
ADD/REMOVE ASSOCIATED PRODUCT MODULE
441
ADD/REMOVE ASSOCIATED CUSTOMER MODULE
442
ADD/REMOVE ASSOCIATED REMARKETING PARTNER MODULE
443
ADD/REMOVE ASSOCIATED IP GROUP PERSONNEL MODULE
444
ADD/REMOVE ASSOCIATED CONTRACT MODULE
445
170C
170D

Fig. 111

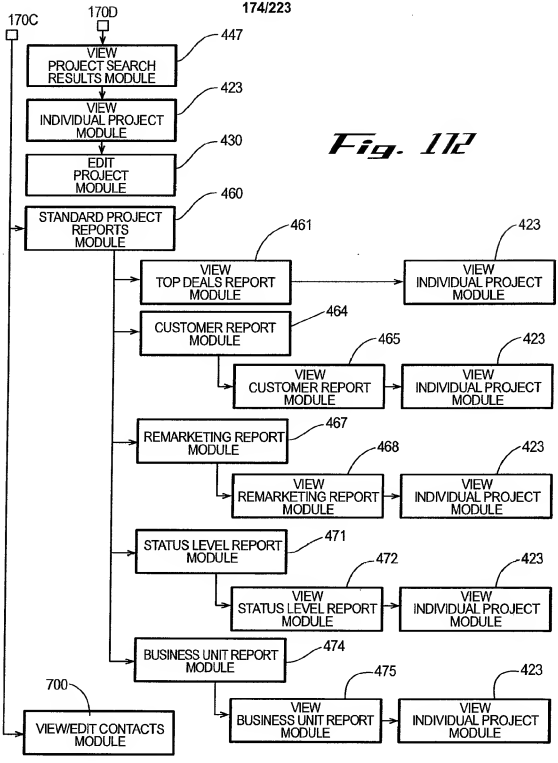

170C
170D
VIEW PROJECT SEARCH RESULTS MODULE
447
VIEW INDIVIDUAL PROJECT MODULE
423
EDIT PROJECT MODULE
430
STANDARD PROJECT REPORTS MODULE
460
VIEW TOP DEALS REPORT MODULE
461
VIEW INDIVIDUAL PROJECT MODULE
423
CUSTOMER REPORT MODULE
464
VIEW CUSTOMER REPORT MODULE
465
VIEW INDIVIDUAL PROJECT MODULE
423
REMARKETING REPORT MODULE
467
VIEW REMARKETING REPORT MODULE
468
VIEW INDIVIDUAL PROJECT MODULE
423
STATUS LEVEL REPORT MODULE
471
VIEW STATUS LEVEL REPORT MODULE
472
VIEW INDIVIDUAL PROJECT MODULE
423
BUSINESS UNIT REPORT MODULE
474
VIEW BUSINESS UNIT REPORT MODULE
475
VIEW INDIVIDUAL PROJECT MODULE
423
700
VIEW/EDIT CONTACTS MODULE

Fig. 11C

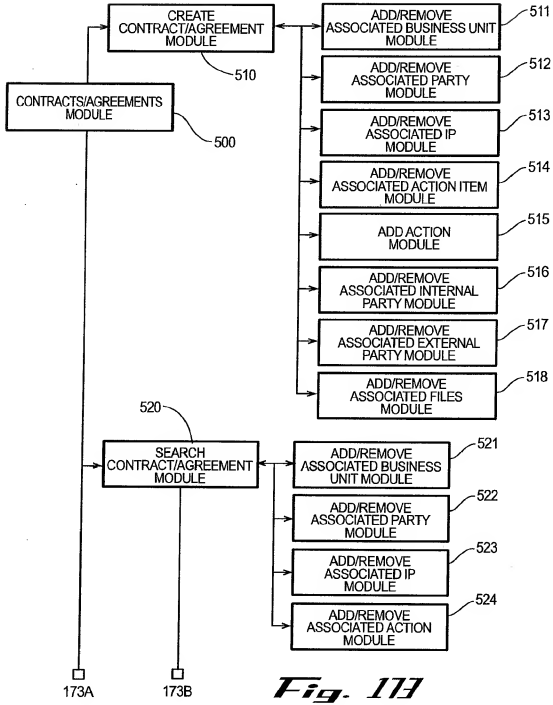

CREATE CONTRACT/AGREEMENT MODULE
510
CONTRACTS/AGREEMENTS MODULE
500
ADD/REMOVE ASSOCIATED BUSINESS UNIT MODULE
511
ADD/REMOVE ASSOCIATED PARTY MODULE
512
ADD/REMOVE ASSOCIATED IP MODULE
513
ADD/REMOVE ASSOCIATED ACTION ITEM MODULE
514
ADD ACTION MODULE
515
ADD/REMOVE ASSOCIATED INTERNAL PARTY MODULE
516
ADD/REMOVE ASSOCIATED EXTERNAL PARTY MODULE
517
ADD/REMOVE ASSOCIATED FILES MODULE
518
520
SEARCH CONTRACT/AGREEMENT MODULE
ADD/REMOVE ASSOCIATED BUSINESS UNIT MODULE
521
ADD/REMOVE ASSOCIATED PARTY MODULE
522
ADD/REMOVE ASSOCIATED IP MODULE
523
ADD/REMOVE ASSOCIATED ACTION MODULE
524
173A
173B

Fig. 11J

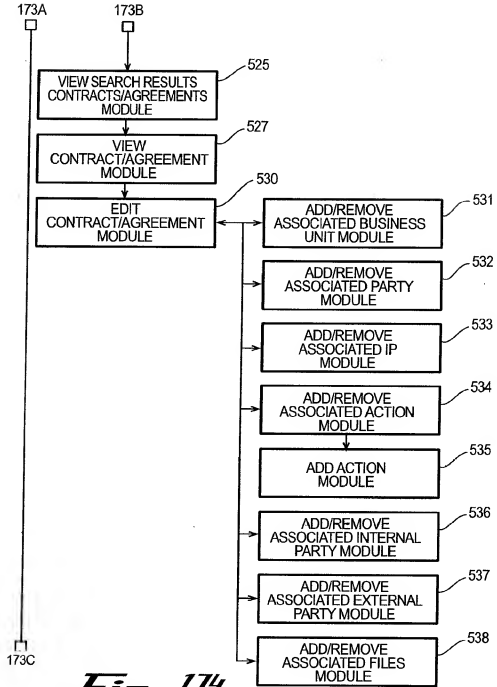

173A
173B
VIEW SEARCH RESULTS CONTRACTS/AGREEMENTS MODULE
525
VIEW CONTRACT/AGREEMENT MODULE
527
EDIT CONTRACT/AGREEMENT MODULE
530
ADD/REMOVE ASSOCIATED BUSINESS UNIT MODULE
531
ADD/REMOVE ASSOCIATED PARTY MODULE
532
ADD/REMOVE ASSOCIATED IP MODULE
533
ADD/REMOVE ASSOCIATED ACTION MODULE
534
ADD ACTION MODULE
535
ADD/REMOVE ASSOCIATED INTERNAL PARTY MODULE
536
ADD/REMOVE ASSOCIATED EXTERNAL PARTY MODULE
537
ADD/REMOVE ASSOCIATED FILES MODULE
538
173C

Fig. 174

Fig. 175

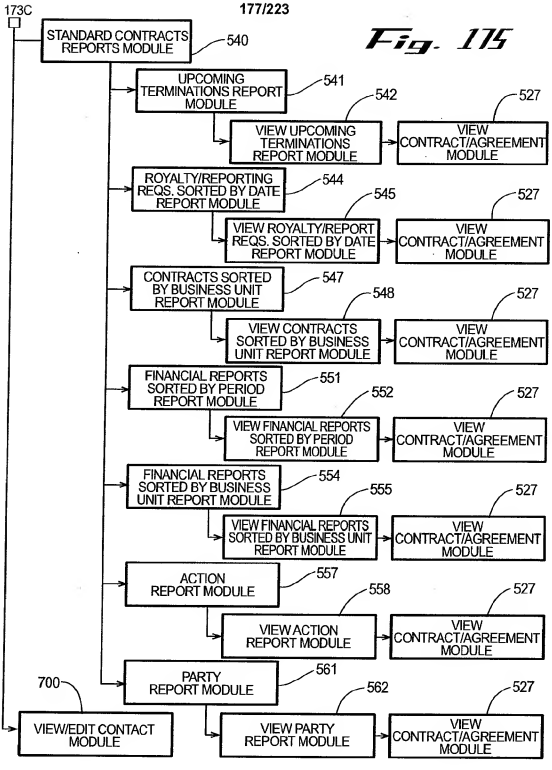
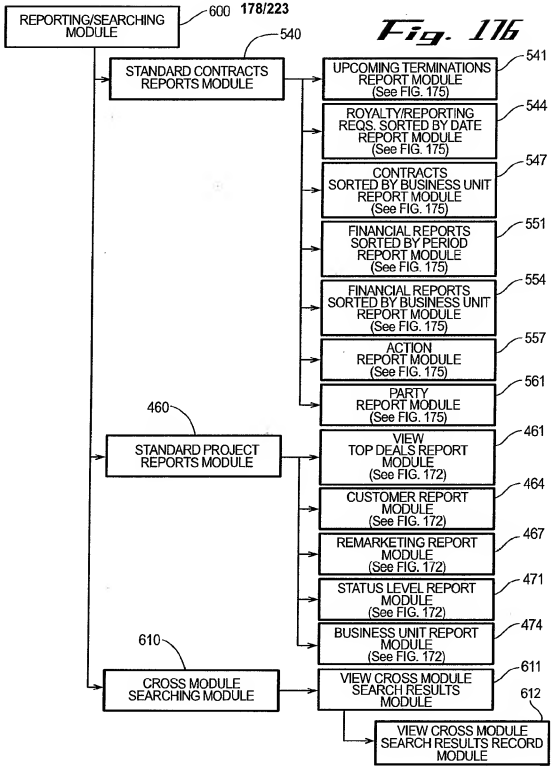

173C
STANDARD CONTRACTS REPORTS MODULE
540
UPCOMING TERMINATIONS REPORT MODULE
541
VIEW UPCOMING TERMINATIONS REPORT MODULE
542
VIEW CONTRACT/AGREEMENT MODULE
527
ROYALTY/REPORTING REQS. SORTED BY DATE REPORT MODULE
544
VIEW ROYALTY/REPORT REQS. SORTED BY DATE REPORT MODULE
545
VIEW CONTRACT/AGREEMENT MODULE
527
CONTRACTS SORTED BY BUSINESS UNIT REPORT MODULE
547
VIEW CONTRACTS SORTED BY BUSINESS UNIT REPORT MODULE
548
VIEW CONTRACT/AGREEMENT MODULE
527
FINANCIAL REPORTS SORTED BY PERIOD REPORT MODULE
551
VIEW FINANCIAL REPORTS SORTED BY PERIOD REPORT MODULE
552
VIEW CONTRACT/AGREEMENT MODULE
527
FINANCIAL REPORTS SORTED BY BUSINESS UNIT REPORT MODULE
554
VIEW FINANCIAL REPORTS SORTED BY BUSINESS UNIT REPORT MODULE
555
VIEW CONTRACT/AGREEMENT MODULE
527
ACTION REPORT MODULE
557
VIEW ACTION REPORT MODULE
558
VIEW CONTRACT/AGREEMENT MODULE
527
PARTY REPORT MODULE
561
VIEW PARTY REPORT MODULE
562
VIEW CONTRACT/AGREEMENT MODULE
527
700
VIEW/EDIT CONTACT MODULE

Fig. 176


REPORTING/SEARCHING MODULE
600
540
STANDARD CONTRACTS REPORTS MODULE
UPCOMING TERMINATIONS REPORT MODULE (See FIG. 175)
541
ROYALTY/REPORTING REQS. SORTED BY DATE REPORT MODULE (See FIG. 175)
544
CONTRACTS SORTED BY BUSINESS UNIT REPORT MODULE (See FIG. 175)
547
FINANCIAL REPORTS SORTED BY PERIOD REPORT MODULE (See FIG. 175)
551
FINANCIAL REPORTS SORTED BY BUSINESS UNIT REPORT MODULE (See FIG. 175)
554
ACTION REPORT MODULE (See FIG. 175)
557
PARTY REPORT MODULE (See FIG. 175)
561
460
STANDARD PROJECT REPORTS MODULE
VIEW TOP DEALS REPORT MODULE (See FIG. 172)
461
CUSTOMER REPORT MODULE (See FIG. 172)
464
REMARKETING REPORT MODULE (See FIG. 172)
467
STATUS LEVEL REPORT MODULE (See FIG. 172)
471
BUSINESS UNIT REPORT MODULE (See FIG. 172)
474
610
CROSS MODULE SEARCHING MODULE
VIEW CROSS MODULE SEARCH RESULTS MODULE
611
612
VIEW CROSS MODULE SEARCH RESULTS RECORD MODULE

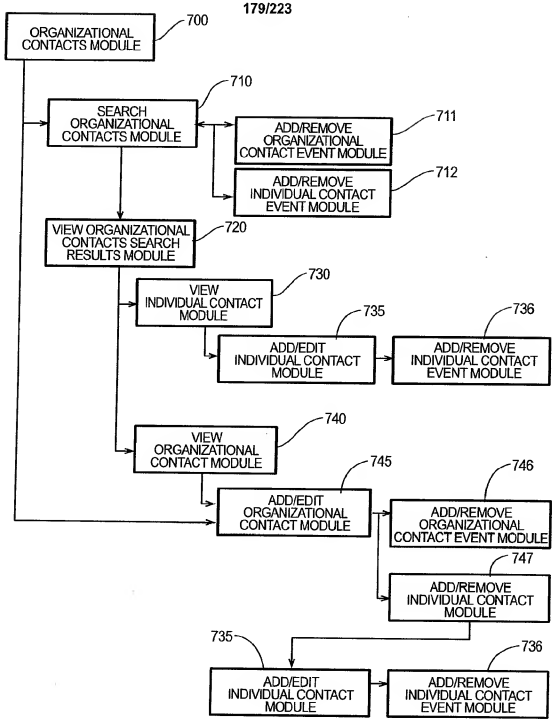

ORGANIZATIONAL CONTACTS MODULE
700
SEARCH ORGANIZATIONAL CONTACTS MODULE
710
ADD/REMOVE ORGANIZATIONAL CONTACT EVENT MODULE
711
ADD/REMOVE INDIVIDUAL CONTACT EVENT MODULE
712
VIEW ORGANIZATIONAL CONTACTS SEARCH RESULTS MODULE
720
VIEW INDIVIDUAL CONTACT MODULE
730
ADD/EDIT INDIVIDUAL CONTACT MODULE
735
ADD/REMOVE INDIVIDUAL CONTACT EVENT MODULE
736
VIEW ORGANIZATIONAL CONTACT MODULE
740
ADD/EDIT ORGANIZATIONAL CONTACT MODULE
745
ADD/REMOVE ORGANIZATIONAL CONTACT EVENT MODULE
746
ADD/REMOVE INDIVIDUAL CONTACT MODULE
747
735
ADD/EDIT INDIVIDUAL CONTACT MODULE
736
ADD/REMOVE INDIVIDUAL CONTACT EVENT MODULE

Fig. 111

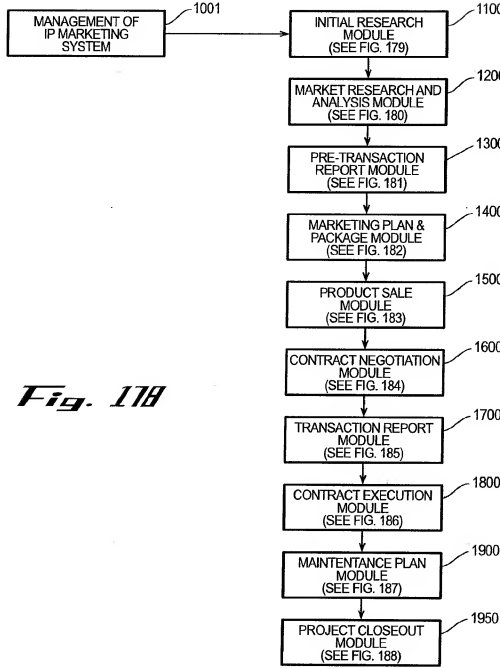

MANAGEMENT OF IP MARKETING SYSTEM
1001
INITIAL RESEARCH MODULE (SEE FIG. 179)
1100
MARKET RESEARCH AND ANALYSIS MODULE (SEE FIG. 180)
1200
PRE-TRANSACTION REPORT MODULE (SEE FIG. 181)
1300
MARKETING PLAN & PACKAGE MODULE (SEE FIG. 182)
1400
PRODUCT SALE MODULE (SEE FIG. 183)
1500
CONTRACT NEGOTIATION MODULE (SEE FIG. 184)
1600
TRANSACTION REPORT MODULE (SEE FIG. 185)
1700
CONTRACT EXECUTION MODULE (SEE FIG. 186)
1800
MAINTENTANCE PLAN MODULE (SEE FIG. 187)
1900
PROJECT CLOSEOUT MODULE (SEE FIG. 188)
1950

Fig. 178

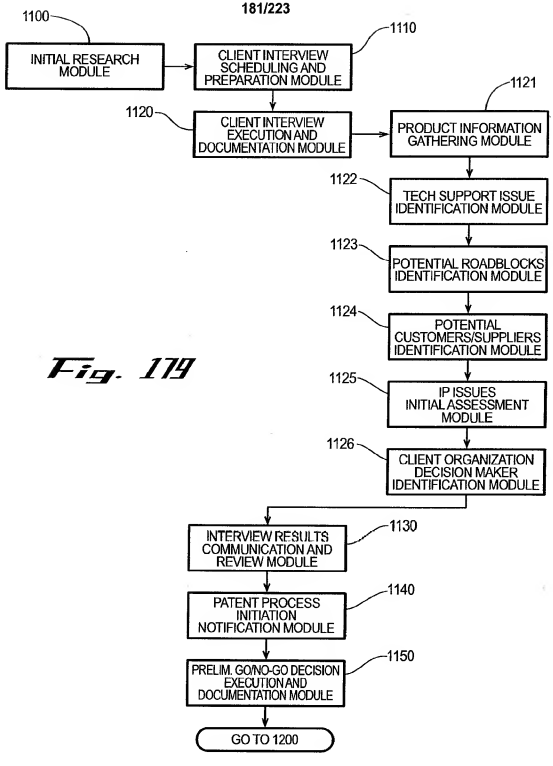

1100
INITIAL RESEARCH MODULE
1110
CLIENT INTERVIEW SCHEDULING AND PREPARATION MODULE
1120
CLIENT INTERVIEW EXECUTION AND DOCUMENTATION MODULE
1121
PRODUCT INFORMATION GATHERING MODULE
1122
TECH SUPPORT ISSUE IDENTIFICATION MODULE
1123
POTENTIAL ROADBLOCKS IDENTIFICATION MODULE
1124
POTENTIAL CUSTOMERS/SUPPLIERS IDENTIFICATION MODULE
1125
IP ISSUES INITIAL ASSESSMENT MODULE
1126
CLIENT ORGANIZATION DECISION MAKER IDENTIFICATION MODULE
1130
INTERVIEW RESULTS COMMUNICATION AND REVIEW MODULE
1140
PATENT PROCESS INITIATION NOTIFICATION MODULE
1150
PRELIM. GO/NO-GO DECISION EXECUTION AND DOCUMENTATION MODULE
GO TO 1200

Fig. 11g

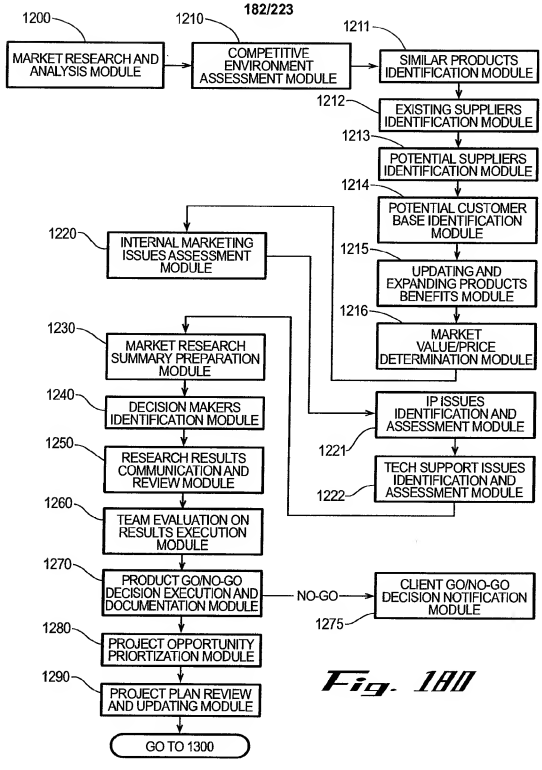

1200
MARKET RESEARCH AND ANALYSIS MODULE
1210
COMPETITIVE ENVIRONMENT ASSESSMENT MODULE
1211
SIMILAR PRODUCTS IDENTIFICATION MODULE
1212
EXISTING SUPPLIERS IDENTIFICATION MODULE
1213
POTENTIAL SUPPLIERS IDENTIFICATION MODULE
1214
POTENTIAL CUSTOMER BASE IDENTIFICATION MODULE
1215
UPDATING AND EXPANDING PRODUCTS BENEFITS MODULE
1216
MARKET VALUE/PRICE DETERMINATION MODULE
1220
INTERNAL MARKETING ISSUES ASSESSMENT MODULE
1221
IP ISSUES IDENTIFICATION AND ASSESSMENT MODULE
1222
TECH SUPPORT ISSUES IDENTIFICATION AND ASSESSMENT MODULE
1230
MARKET RESEARCH SUMMARY PREPARATION MODULE
1240
DECISION MAKERS IDENTIFICATION MODULE
1250
RESEARCH RESULTS COMMUNICATION AND REVIEW MODULE
1260
TEAM EVALUATION ON RESULTS EXECUTION MODULE
1270
PRODUCT GO/NO-GO DECISION EXECUTION AND DOCUMENTATION MODULE
NO-GO
1275
CLIENT GO/NO-GO DECISION NOTIFICATION MODULE
1280
PROJECT OPPORTUNITY PRIORTIZATION MODULE
1290
PROJECT PLAN REVIEW AND UPDATING MODULE
GO TO 1300

Fig. 18B

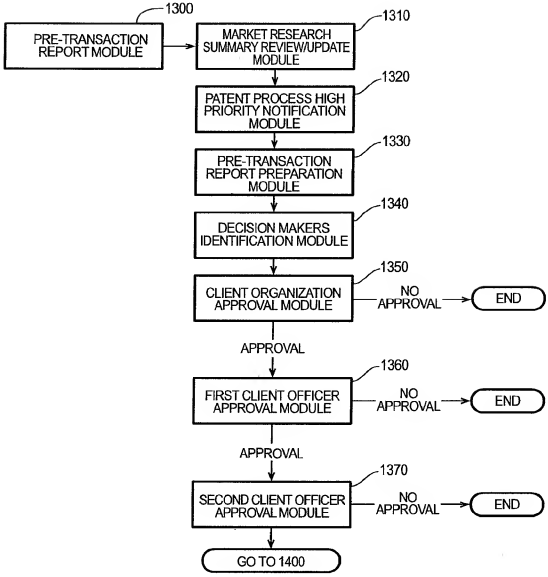

1300
PRE-TRANSACTION REPORT MODULE
1310
MARKET RESEARCH SUMMARY REVIEW/UPDATE MODULE
1320
PATENT PROCESS HIGH PRIORITY NOTIFICATION MODULE
1330
PRE-TRANSACTION REPORT PREPARATION MODULE
1340
DECISION MAKERS IDENTIFICATION MODULE
1350
CLIENT ORGANIZATION APPROVAL MODULE
NO APPROVAL
END
APPROVAL
1360
FIRST CLIENT OFFICER APPROVAL MODULE
NO APPROVAL
END
APPROVAL
1370
SECOND CLIENT OFFICER APPROVAL MODULE
NO APPROVAL
END
GO TO 1400

Fig. 181

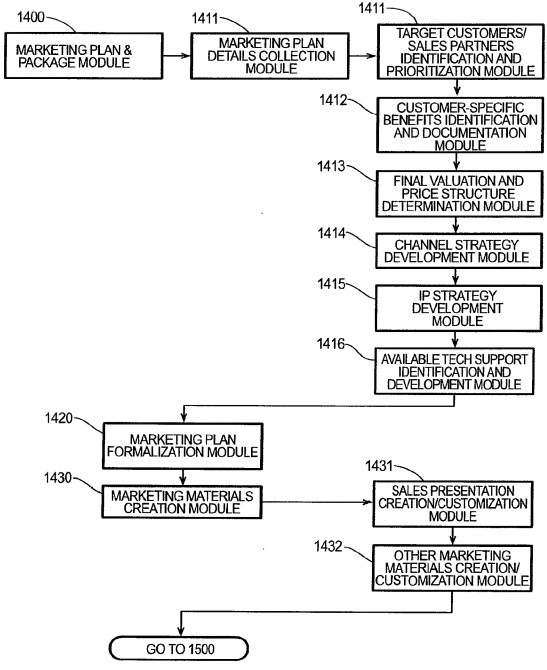

1400
MARKETING PLAN & PACKAGE MODULE
1411
MARKETING PLAN DETAILS COLLECTION MODULE
1411
TARGET CUSTOMERS/ SALES PARTNERS IDENTIFICATION AND PRIORITIZATION MODULE
1412
CUSTOMER-SPECIFIC BENEFITS IDENTIFICATION AND DOCUMENTATION MODULE
1413
FINAL VALUATION AND PRICE STRUCTURE DETERMINATION MODULE
1414
CHANNEL STRATEGY DEVELOPMENT MODULE
1415
IP STRATEGY DEVELOPMENT MODULE
1416
AVAILABLE TECH SUPPORT IDENTIFICATION AND DEVELOPMENT MODULE
1420
MARKETING PLAN FORMALIZATION MODULE
1430
MARKETING MATERIALS CREATION MODULE
1431
SALES PRESENTATION CREATION/CUSTOMIZATION MODULE
1432
OTHER MARKETING MATERIALS CREATION/ CUSTOMIZATION MODULE
GO TO 1500

Fig. 182

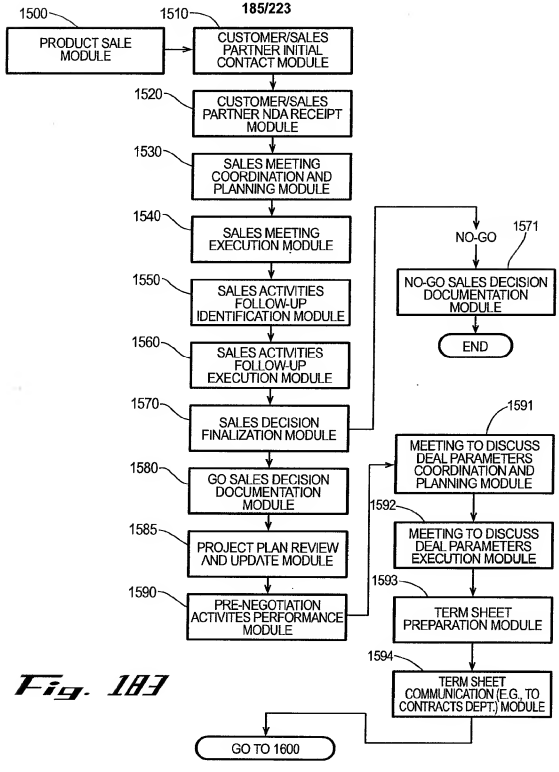

1500
PRODUCT SALE MODULE
1510
CUSTOMER/SALES PARTNER INITIAL CONTACT MODULE
1520
CUSTOMER/SALES PARTNER NDA RECEIPT MODULE
1530
SALES MEETING COORDINATION AND PLANNING MODULE
1540
SALES MEETING EXECUTION MODULE
1550
SALES ACTIVITIES FOLLOW-UP IDENTIFICATION MODULE
1560
SALES ACTIVITIES FOLLOW-UP EXECUTION MODULE
1570
SALES DECISION FINALIZATION MODULE
1580
GO SALES DECISION DOCUMENTATION MODULE
1585
PROJECT PLAN REVIEW AND UPDATE MODULE
1590
PRE-NEGOTIATION ACTIVITES PERFORMANCE MODULE
NO-GO
1571
NO-GO SALES DECISION DOCUMENTATION MODULE
END
1591
MEETING TO DISCUSS DEAL PARAMETERS COORDINATION AND PLANNING MODULE
1592
MEETING TO DISCUSS DEAL PARAMETERS EXECUTION MODULE
1593
TERM SHEET PREPARATION MODULE
1594
TERM SHEET COMMUNICATION (E.G., TO CONTRACTS DEPT.) MODULE
GO TO 1600

Fig. 183

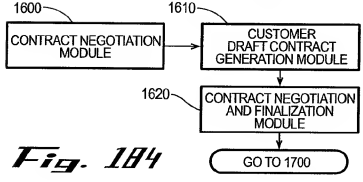


Fig. 184

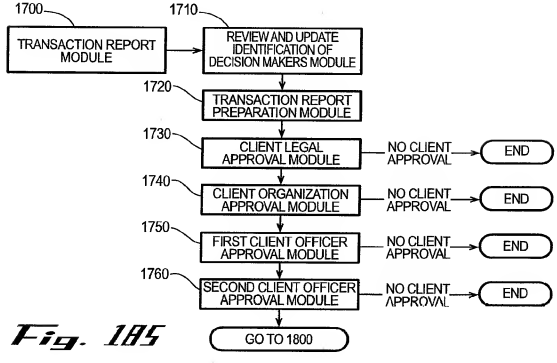


Fig. 185

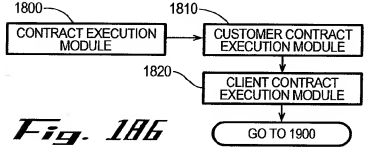


Fig. 186

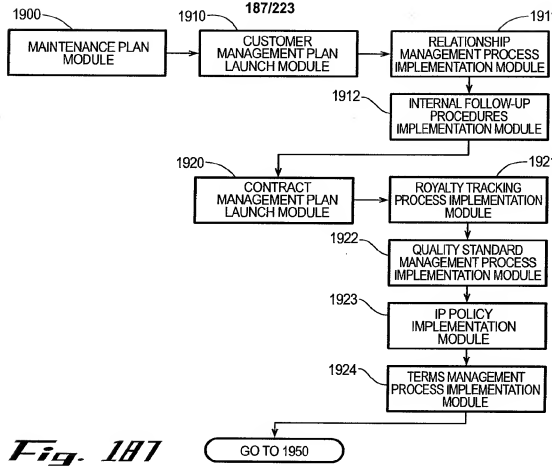


Fig. 18I

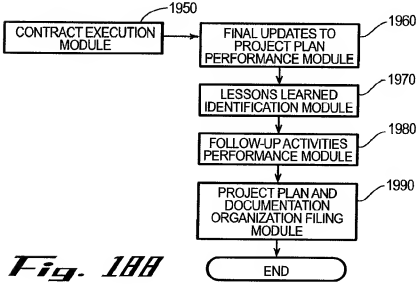


Fig. 18J

Project Template Project Plan

ID	WBS	Task Name	Duration	Start	Finish	Pred	Succ	% Comp	Del	Resources
1	1	Conduct initial research	5 days	Mon 1/3/00	Fri 1/7/00			0%	No	Product Mgr
13	2	Conduct market research and analysis	10 days	Mon 1/10/00	Fri 1/21/00			0%	No	Mktg Analyst
31	3	Complete and approve pre-transaction report (PTR)	15 days	Mon 1/24/00	Fri 2/11/00			0%	No	Product Mgr
39	4	Develop marketing plan & package	15 days	Mon 1/24/00	Fri 2/11/00			0%	No	Mktg/Sales Rep
51	5	Sell product	50 days	Mon 2/14/00	Fri 4/21/00			0%	No	Mktg/Sales Rep
66	6	Negotiate contract	50 days	Mon 4/24/00	Fri 6/30/00			0%	No	Contract Mgr
69	7	Complete & approve transaction report (TR)	15 days	Mon 7/3/00	Fri 7/21/00			0%	No	Contract Mgr
78	8	Execute contract	10 days	Mon 7/24/00	Fri 8/4/00			0%	No	Contract Mgr
79	9	Set up maintenance plan	5 days	Mon 8/7/00	Fri 8/11/00	89		0%	No	Mktg/Sales Rep
88	10	Close out project	5 days	Mon 8/14/00	Fri 8/18/00			0%	Yes	Project Lead

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Fig. 18g

Project: Template Project Plan

51 Sell product
At this point, duplicate project plan for each target customer for the specified product.
88 Close out project
Project may potentially end any one of several points within project plan. Must complete close out tasks at where ever project end falls within project plan.

Fig. 19I

Fig. 19I

Project Template Project Plan

ID	WBS	Task Name	Duration	Start	Finish	Pred	Succ	% Comp	Del	Resources
1	1	Conduct Initial research	5 days	Mon 1/3/00	Fri 1/7/00			0%	No	Product Mgr
2	1.1	Schecule & pregare for client interview	1 day	Mon 1/3/00	Mon 1/3/00		3	0%	No	Product Mgr
3	1.2	Conduct & document client interview	1 day	Tue 1/4/00	Tue 1/4/00	2	10,11	0%	No	Product Mgr
4	1.2.1	Gather product information	1 day	Tue 1/4/00	Tue 1/4/00			0%	No	Product Mgr
5	1.2.2	ID tech support issues	1 day	Tue 1/4/00	Tue 1/4/00			0%	No	Product Mgr
6	1.2.3	ID potential roadblocks	1 day	Tue 1/4/00	Tue 1/4/00			0%	No	Product Mgr
7	1.2.4	ID potential customers/suppliers	1 day	Tue 1/4/00	Tue 1/4/00			0%	No	Product Mgr
8	1.2.5	Perform initial assessment of IP issues	1 day	Tue 1/4/00	Tue 1/4/00			0%	No	Product Mgr
9	1.2.6	ID client organization decision makers	1 day	Tue 1/4/00	Tue 1/4/00			0%	No	Product Mgr
10	1.3	Communicate and review interview results	2 days	Wed 1/5/00	Thu 1/6/00	3	12	0%	No	Product Mgr
11	1.4	Notify IPMAN to begin patent process	1 day	Wed 1/5/00	Wed 1/5/00	3		0%	Yes	Product Mgr
12	1.5	Make & document prelim go/no-go decision	1 day	Fri 1/7/00	Fri 1/7/00	10	25,14,21	0%	Yes	Product Mgr
13	2	Conduct market research and analysis	10 days	Mon 1/10/00	Fri 1/21/00			0%	No	MktAnalyst
14	2.1	Assess competitive environment	4 days	Mon 1/10/00	Thu 1/13/00	12	24	0%	No	MktAnalyst
15	2.1.1	ID similar products	4 days	Mon 1/10/00	Thu 1/13/00			0%	No	MktAnalyst
16	2.1.2	ID existing suppliers	4 days	Mon 1/10/00	Thu 1/13/00			0%	No	MktAnalyst
17	2.1.3	ID potential suppliers	4 days	Mon 1/10/00	Thu 1/13/00			0%	No	MktAnalyst
18	2.1.4	ID potential customer base	4 days	Mon 1/10/00	Thu 1/13/00	41		0%	No	MktAnalyst
19	2.1.5	Update & expand product benefits	4 days	Mon 1/10/00	Thu 1/13/00			0%	No	MktAnalyst
20	2.1.6	Determine market value/price	4 days	Mon 1/10/00	Thu 1/13/00			0%	No	MktAnalyst
21	2.2	Assess internal marketing issues	4 days	Mon 1/10/00	Thu 1/13/00	12	24	0%	No	Product Mgr
22	2.2.1	ID & assess IP issues	4 days	Mon 1/10/00	Thu 1/13/00			0%	No	Product Mgr
23	2.2.2	ID & assess tech support issues	4 days	Mon 1/10/00	Thu 1/13/00			0%	No	Product Mgr

Fig. 19J

Project Template Project Plan

ID	Ⓐ	WBS	Task Name	Duration	Start	Finish	Pred	Succ	% Comp	Del	Resources
24	◈	2.3	Prepare market research summary	1 day	Fri 1/14/00	Fri 1/14/00	14,21	26	0%	Yes	Mfg;Analyst
25	◈	2.4	Id decision make's	1 day	Mon 1/10/00	Mon 1/10/00	12	26	0%	Yes	Product Mg
26		2.5	Communicate and review research results	2 days	Mon 1/17/00	Mon 1/18/00	24,25	27	0%	No	Mfg;Analyst
27		2.6	Conduct team evaluation on results	1 day	Wed 1/19/00	Wed 1/19/00	26	28	0%	No	Product Mg
28	◈	2.7	Make & document product go/no-go decision	1 day	Thu 1/20/00	Thu 1/20/00	27	29,30	0%	Yes	Product Mg
29	◈	2.8	Prioritize project opportunity or notify client of no go decision	1 day	Fri 1/21/00	Fri 1/21/00	28	41,[illegible]	0%	Yes	Product Mg
30		2.9	Review & update project plan	1 day	Fri 1/21/00	Fri 1/21/00	28		0%	Yes	Product Mg
31		3	Complete and approve pre-transaction report (PTR)	15 days	Mon 1/24/00	Fri 2/11/00			0%	No	Product Mg
32	◈	3.1	Review/update market research summary	1 day	Mon 1/24/00	Mon 1/24/00	29		0%	Yes	Mfg;Analyst
33		3.2	Notify PMAN of potential asset/new patent process into high priority	1 day	Mon 1/24/00	Mon 1/24/00	29		0%	No	Product Mg
34	◈	3.3	Prepare PTE	5 days	Mon 1/24/00	Fri 1/28/00	29	36	0%	Yes	Product Mg
35	◈	3.4	ID decision makers	1 day	Mon 1/24/00	Mon 1/24/00	29		0%	Yes	Product Mg
36		3.5	Gain client organization approval	4 days	Mon 1/31/00	Thu 2/3/00	34	27	0%	Yes	Product Mg
37		3.6	Gain VP Corporate Development approval	3 days	Fri 2/4/00	Tue 2/8/00	36	38	0%	Yes	Product Mg
38		3.7	Gain VP CIO approval	3 days	Wed 2/9/00	Fri 2/11/00	37	52	0%	Yes	Product Mg
39		4	Develop marketing plan & package	15 days	Mon 1/24/00	Fri 2/11/00			0%	No	Mfg;Sales Rep
40	⊟	4.1	Gather market/traffic plan details	5 days	Mon 1/24/00	Fri 1/28/00	29	47	0%	No	Mfg;Sales Rep
41		4.1.1	ID & prioritize target customer(s)/sales partners	5 days	Mon 1/24/00	Fri 1/28/00	18,29		0%	Yes	Mfg;Sales Rep
42	◈	4.1.2	ID & document customer-specific benefits	5 days	Mon 1/24/00	Fri 1/28/00			0%	Yes	Mfg;Sales Rep
43	◈	4.1.3	Determine final valuation & price structure	5 days	Mon 1/24/00	Fri 1/28/00			0%	Yes	Mfg;Analyst
44		4.1.4	Develop channel strategy	5 days	Mon 1/24/00	Fri 1/28/00			0%	Yes	Mfg;Sales Rep
45		4.1.5	Develop IP strategy	5 days	Mon 1/24/00	Fri 1/28/00			0%	No	Mfg;Sales Rep
46		4.1.6	ID & develop available tech support	5 days	Mon 1/24/00	Fri 1/28/00			0%	No	Mfg;Sales Rep

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Fig. 197

Project Template Project Plan

ID	Ⓐ	WBS	Task Name	Duration	Start	Finish	Pred	Succ	% Comp	Deli	Resources
47		4.2	Formalize marketing plan	5 days	Mon 1/3/00	Fri 2/4/00	40	50,49	0%	Yes	Mktg/Sales Rep
48		4.3	Create marketing materials	5 days	Mon 2/7/00	Fri 2/11/00			0%	No	Product Mgr
49		4.3.1	Create/customize sales presentation	5 days	Mon 2/7/00	Fri 2/11/00	47		0%	Yes	Product Mgr
50		4.3.2	Create/customize other marketing materials	5 days	Mon 2/7/00	Fri 2/11/00	47		0%	Yes	Product Mgr
51	◈	5	Sell product	50 days	Mon 2/14/00	Fri 4/21/00			0%	No	Mktg/Sales Rep
52	◈	5.1	Make initial contact with customer(s)/sales partners	3 days	Mon 2/14/00	Wed 2/16/00	38	53	0%	Yes	Mktg/Sales Rep
53	◈	5.2	Obtain NDA from customer/sales partner	5 days	Thur 2/17/00	Wed 2/23/00	52	54	0%	Yes	Mktg/Sales Rep
54		5.3	Coordinate & plan sales meeting	10 days	Thur 2/24/00	Wed 3/8/00	53	55	0%	Yes	Mktg/Sales Rep
55	◈	5.4	Conduct sales meeting	1 day	Thurs 3/9/00	Thu 3/9/00	54	56	0%	No	Mktg/Sales Rep
56	◈	5.5	ID follow-up sales activities	1 day	Fri 3/10/00	Fri 3/10/00	55	57	0%	Yes	Mktg/Sales Rep
57		5.6	Perform follow-up sales activities	5 days	Mon 3/13/00	Fri 3/17/00	56	58	0%	No	Mktg/Sales Rep
58	◈	5.7	Finalize sales decision	10 days	Mon 3/20/00	Fri 3/31/00	57	59,60,62	0%	Yes	Mktg/Sales Rep
59	◈	5.8	Document go/no go sale decision	1 day	Mon 4/3/00	Mon 4/3/00	58		0%	Yes	Mktg/Sales Rep
60		5.9	Review & upcate project plan	1 day	Mon 4/3/00	Mon 4/3/00	58		0%	Yes	Mktg/Sales Rep
61		5.10	Perform pre-negotiation activities	15 days	Mon 4/3/00	Fri 4/21/00			0%	No	Mktg/Sales Rep
62		5.10.1	Coordinate & plan meeting to discuss ceal parameters	10 days	Mon 4/3/00	Fri 4/14/00	58	63	0%	Yes	Mktg/Sales Rep
63	◈	5.10.2	Conduct meeting to discuss ceal parameters	1 day	Mon 4/17/00	Mon 4/17/00	62	64	0%	No	Mktg/Sales Rep
64	◈	5.10.3	Prepare term sheet	3 days	Tue 4/18/00	Thu 4/20/00	63	65	0%	Yes	Mktg/Sales Rep
65		5.10.4	Communicate term sheet to Contracts	1 day	Fri 4/21/00	Fri 4/21/00	64	67	0%	No	Mktg/Sales Rep
66		6	Negotiate contract	50 days	Mon 4/24/00	Fri 6/30/00			0%	No	Contract Mgr
67	◈	6.1	Generate draft contract for customer	5 days	Mon 4/24/00	Fri 4/28/00	65	68	0%	Yes	Contract Mgr
68	◈	6.2	Negotiate and finalize contract	45 days	Mon 5/1/00	Fri 6/30/00	67	70,71	0%	Yes	Contract Mgr
69		7	Complete & approve transaction report (TR)	15 days	Mon 7/3/00	Fri 7/21/00			0%	No	Contract Mgr

Project Template Project Plan

ID	WBS	Task Name	Duration	Start	Finish	Pred	Succ	% Comp	Del	Resources
70	7.1	Review/Update decision matters	1 day	Mon 7/3/00	Mon 7/3/00	68		0%	Yes	Mktg/Sales Rep
71	7.2	Prepare TR	5 days	Mon 7/3/00	Fri 7/7/00	68	72	0%	Yes	Mktg/Sales Rep
72	7.3	Obtain PHARK legal approval	1 day	Mon 7/10/00	Mon 7/10/00	71	73	0%	Yes	Contract Mgr
73	7.4	Obtain client organization approval	3 days	Mon 7/11/00	Thu 7/13/00	72	74	0%	Yes	Contract Mgr
74	7.5	Obtain VP Corporate Development approval	3 days	Fri 7/14/00	Tue 7/18/00	73	75	0%	Yes	Contract Mgr
75	7.6	Obtain VP CIO approval	3 days	Wed 7/19/00	Fri 7/21/00	74	77	0%	Yes	Contract Mgr
76	8	Execute contract	3 days	Mon 7/24/00	Fri 8/4/00			0%	No	Contract Mgr
77	8.1	Obtain customer contract signature	10 days	Mon 7/24/00	Wed 8/2/00	75	78	0%	Yes	Contract Mgr
78	8.2	Obtain PHARK contract signature	8 days	Thur 8/3/00	Fri 8/4/00	77	80,83	0%	Yes	Contract Mgr
79	9	Set up maintenance plan	2 days	Mon 8/7/00	Fri 8/11/00		89	0%	No	Mktg/Sales Rep
80	9.1	Launch customer management plan	5 days	Mon 8/7/00	Fri 8/11/00	78		0%	No	Mktg/Sales Rep
81	9.1.1	Implement relationship management process	5 days	Mon 8/7/00	Fri 8/11/00			0%	No	Mktg/Sales Rep
82	9.1.2	Implement internal follow-up procedures	5 days	Mon 8/7/00	Fri 8/11/00			0%	No	Mktg/Sales Rep
83	9.2	Launch contract management plan	5 days	Mon 8/7/00	Fri 8/11/00	78		0%	No	Contract Mgr
84	9.2.1	Implement royalty tracking process	5 days	Mon 8/7/00	Fri 8/11/00			0%	No	Contract Mgr
85	9.2.2	Implement quality standard management process	5 days	Mon 8/7/00	Fri 8/11/00			0%	No	Contract Mgr
86	9.2.3	Implement IP policing	5 days	Mon 8/7/00	Fri 8/11/00			0%	No	Contract Mgr
87	9.2.4	Implement terms management process	5 days	Mon 8/7/00	Fri 8/11/00			0%	No	Contract Mgr
88	10	Close out project	5 days	Mon 8/14/00	Fri 8/18/00			0%	Yes	Project Lead
89	10.1	Perform final updates to project plan	1 day	Mon 8/14/00	Mon 8/14/00	79	90	0%	Yes	Project Lead
90	10.2	Identify lessons learned & perform follow-up activities	2 days	Tue 8/15/00	Wed 8/16/00	89	91	0%	Yes	Project Lead
91	10.3	Organize & file project plan & documentation	2 days	Thu 8/17/00	Fri 8/18/00	90		0%	Yes	Project Lead

Fig. 194

Project Template Project Plan

3 Conduct & document client interview
If create interview form, can eliminate tasks 1.2.1 thru 1.2.6
4 Gather product information
Must Include product benefits, similar products, etc.

5 ID tech support issues
Type of support required? Tech transfer? Support partner? No support?
8 Perform initial assessment of IP Issues
Title and rights:
1. Ownership?
2. Protection?
3. Possible infringement?
9 ID client organization decision makers
Consider decision makers and needed officer buy-in.
11 Notify IPMAN to begin patent process
Potential checklist/form for interview process. If form, change task to "Provide Interview form (name or number) to IPMAN". This notification will trigger IPMAN to review patent status.
12 Make & document prelim go/no-go decision
Potential form to doc reasons for go/no-go.

14 Assess competitive environment
Potential checklist or standard form for assessing comp. environment. If so, may choose to delete 2.1.1 thru 2.1.7 and change 2.1 task name to something like complete Form XXX, Competitive Environment Assessment.
22 ID & assess IP Issues
Expanded investigation of any ownership, protection, potential infringement issues.
24 Prepare market research summary
Potential Score Card form. If so, indicate in task field.

25 ID decision makers
Verify that all key decision makers are identified
28 Make & document product go/no go decision
Potential form to doc reasons for go/no go decision
29 Prioritize project opportunity or notify client of no go decision
Create scorecard to prioritize.
Create form letter that thanks client and notifies of status of product.

32 Review/update market research summary
Potential form, Part 2 of Score Card, more market plan specific info.
34 Prepare PTR
No formal client interview but Product Manager will communicate with client regularly while preparing the PTR
35 Id decision makers
May require multiple client approvals. If so, add task for additional approve(s) - i.e. business unit and IT approval.
If patent license, add task for owner approval.
42 ID & document customer-specific benefits
If form a checklist, can eliminate this task. May be considered part of marketing plan.
43 Determine final valuation & price structure
If form or checklist, can eliminate this task.

Fig. 195

	Project Template Project Plan
51	Sell product
52	At this point, duplicate project plan for each target customer for the specified product. Make initial contact with customer(s)/sales partners Must have signed PTR before initial contact with potential customer
53	Obtain NDA from customer/sales partner inbound NDA for receiving information and mutual NDA also available on h: drive
55	Conduct sales meeting including PowerPoint sales presentation
56	ID follow-up sales activities May include demos, site visits to existing customers, brochures, additional presentations, response to meeting questions...OR NOT=HNG!
58	Finalize sales decision Resource for this task is actually the customer.
63	Conduct meeting to discuss deal parameters Recommend use term sheet for outline of meeting agenda. See link to term sheet on task 5.10.3. Prepare term sheet.
68	Negotiate and finalize contract Could be multiple drafts and result in additional meetings between IPMARK and customer. Includes obtaining all necessary approvals
71	Prepare TR If time & resources permit, Mktg/Sales rep should begin pulling together the TR in parallel with task 6.2, Negotiate & finalize contract.
85	Implement quality standard management process follow up with new customer/sales partner for samples of products to check for product quality.
88	Close out project Project may potentially end any one of several points within project plan. Must complete close out tasks at where ever project end fails within project plan.
89	Perform final updates to project plan Final updates include any clean-up to project plan, e.g., review/update task durations to accurately represent time spent on project tasks. Final update helpful in accurately tracking project and project plan efficiency to allow for process improvement.
90	Identify lessons learned & perform follow-up activities Follow-up could include analyzing project effectiveness and updating generic plan
91	Organize & file project plan & documentation Final project plan should be part of project documentation. Need to develop checklist for keep/not keep documentation. May want to choose std color file for this so always identifiable. Also consider one color for project in progress and another color for project complete.

Fig. 19G

Client Interview questionnaire (task 1.2)
(Completion Date:_____)

1. Gather project information

2. ID tech support issues

3. ID potential roadblocks

4. ID potential customers/suppliers

5. Perform initial assessment of IP issues

6. ID client organization decision makers

Fig. 197

Assess competitive environment checklist (task 2.1)
(Duration: 4 days - Complete by: _____)

ID similar products ..... _____

ID existing suppliers ..... _____

ID potential suppliers ..... _____

ID potential customer base ..... _____

Update & expand project benefits ..... _____

Determine market value/price ..... _____

Assess Comp Envir.doc

Fig. 19H

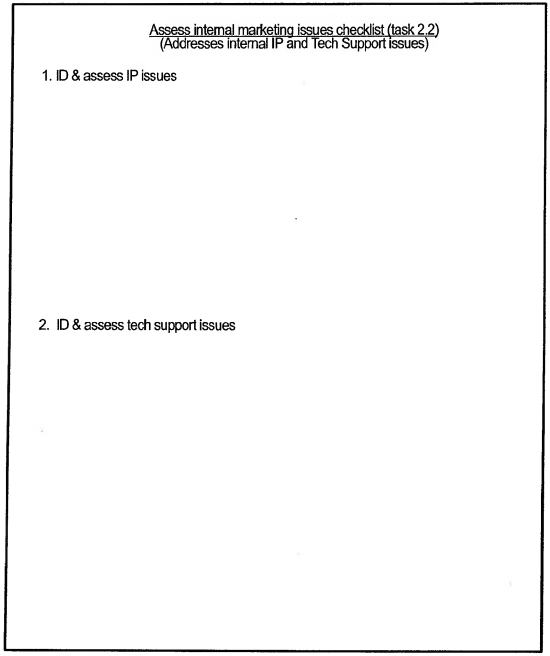
Assess internal marketing issues checklist (task 2.2)
(Addresses internal IP and Tech Support issues)
1. ID & assess IP issues
2. ID & assess tech support issues

Fig. 199

INTELLECTUAL PROPERTY OUTMARKETING
PRE-TRANSACTION REPORT

Product/Project Name: _____

Entity Requesting: _____

Contacts (Entity Name, Phone Numbers, Email): _____

Outmarketing Party(s) (Company, Address, State of Incorporation, Contacts, Phone Phone Numbers): _____

Intellectual Property Involved: (Patents, Trademarks, Trade Secrets, Software, etc.) _____

Background of Deal (How Deal Developed, Summary of Intellectual Property Functionality/Uses, Deal Structure): _____

Financial Analysis (Revenue to be Recognized, Cost Savings, etc.): _____

Competitive Analysis (Worldwide, Outside US, US only, Outside 9 State Region, etc.): _____

Status of Deal (Ready to Sign Up, Need Negotiation Assistance): _____

Anticipated Timeline (Initial meeting, Demos, Sign Contract, etc.): _____

_____, a _____ Corporation subsidiary, requests _____ IPMARK _____ on its behalf to enter into an intellectual property outmarketing agreement according to the above-described terms.

Requestor	Entity/Dept.	Title	Date

Fig. 200

200/223

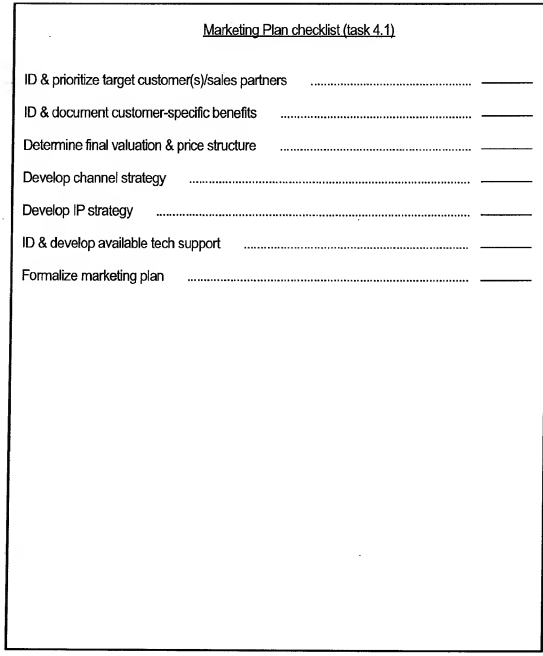

Fig. 201

NONDISCLOSURE AGREEMENT

THIS NONDISCLOSURE AGREEMENT is made by and between [Name of _____[Entity], a corporation organized under the laws of _____ ("OWNER"), and _____, a corporation organized under the laws of_____ (the "Company"), effective as of_____ ,20____. The parties agree as follows:

1. Project Defined. The Company may receive from OWNER information of a non-public nature for use by the Company and its officers,directors, agents, employees and representatives, including financial and legal advisers (collectively "representatives"), in the course of the performance of the Company's services for OWNER in connection with_____ _____ _____ (the "Project).

2. Information Defined. The Company acknowledges that, in the course of its performance of services for or discussions with OWNER in connection with the Project, the Company will receive certain private and proprietary information from or about OWNER or its affiliates, including but not limited to technical, financial or business information and models, names of customers or partners; proposed business deals, reports, plans, market projections, software programs, data or any other private and proprietary information relating to the Project which may include certain trade secrets ("Information"). The term "Information" as used herein also includes: (i) the fact that the Information has been made available to or is being inspected or evaluated by the Company; (ii) the fact that the Company is providing services to OWNER or is otherwise involved in or discussing the Project; and (iii) any information, work papers, analyses, compilations, projections, studies, documents, terms, conditions, correspondence, facts or other materials derived or produced by the Company or its representatives for OWNER in connection with the Project. Any information supplied by OWNER to the Company prior to the execution of this Agreement shall be subject to the same treatment as the information made available after the execution of this Agreement.

3. Exclusions for Definition. The term "Information" as used herein does not include any data or information that: (a) is already known to the Company at the time it is disclosed to the Company; or (b) before being divulged by the Company: (i) has become generally known to the public through no wrongful act of the Company or its representatives; (ii) has been rightfully received by the Company from a third party without restriction on disclosure and without a breach of an obligation of confidentiality

PRIVATE/PROPRIETERY/LOCK

Fig. 202

running directly or indirectly to OWNER; (iii) has been approved for release by a written authorization by OWNER; or (iv) is independently developed by the Company without use directly or indirectly, of the information received from OWNER.

4. Nondisclosure Obligation. The Company shall keep the Information confidential and shall not disclose such Information, in whole or in part, to any person other than its Representatives who need to know such Information in connection with the Company's performance of services for OWNER in connection with the Project except with the prior written consent of OWNER or as otherwise permitted hereunder. Such Representatives shall be informed by the Company of the confidential nature of the Information and shall be required by the Company to agree in writing to be bound by this Agreement. The Information shall be used by the Company solely for the purpose of performing services for or otherwise evaluating the Information provided by OWNER in connection with the Project, and shall not be otherwise used for the Company's own benefit or for any purpose detrimental to the interest of _____.

5. Standard or Protection. For the purpose of complying with the obligations set forth herein, the Company shall use efforts commensurate with those that it employs for the protection of corresponding sensitive Information of its own, which shall in any event be no lesser a standard than the type of efforts that would be taken by a reasonable business for the protection of its own highly confidential information and trade secrets.

6. Compliance with Legal Process. In the event that the Company is legally-requested or required (by oral questions, interrogatories, requests for information or documents, subpoena, Civil Investigative Demand or similar process or, in the opinion of counsel for the Company, by federal or state securities or other statutes, regulations or laws) ot disclose any Information, the Company shall promptly notify OWNER of such request or requirement prior to disclosure so that OWNER may seek an appropriate protective order and/or waive compliance with the terms of this Agreement.

7. Ownership; Return of Information. All Information (including tangible copies and computerized or electronic versions and summaries thereof) shall remain the property of OWNER. Within ten (10) days following the receipt of a written request from OWNER, the Company shall deliver to OWNER all tangible materials containing or embodying the information received from OWNER, together with a certificate executed by an officer of the Company certifying that all such materials in the Company's possession or control have been delivered to OWNER or destroyed. The Company shall not assert directly or indirectly any right with respect to the information which may impair or be adverse to OWNER's ownership thereof.

PRIVATE/PROPRIETARY/LOCK

Fig. 20J

8. Remedies for Breach. The Company understands and agrees that money damages would not be a sufficient remedy for any breach of this Agreement and that OWNER shall be entitles to seek injunctive or other equitable relief to remedy or Forestall any such breach or threatened breach. Such remedy shall not be deemed to be the exclusive remedy for any breach of this Agreement, but shall be in addition to all other rights and remedies available at law or in equity.

9. No Representations or Further Obligations. Neither this Agreement nor the disclosure of Information shall constitute or imply any promise or intention to make any purchase or services by OWNER. None of the Information which may be disclosed by OWNER shall constitute any representation, warranty, assurance, guarantee or inducement by OWNER to the Company of any kind, and in particular, with respect to the accuracy or completeness of any Information or the non-infringement of trademarks, patents, copyrights, mask protection rights or any other intellectual property rights, or other rights of third persons. It is understood that this Agreement does not obligate OWNER to enter into any further agreements or to proceed with any possible relationship or other transaction.

10. Term: Termination. This Agreement shall terminate as to the exchange of any new Information three (3) years after the effective date hereof. Either party may terminate the exchange of Information under this Agreement at any time by written notice to the other specifically referencing this Agreement. In any event, however, the obligations of the Company to maintain the confidentiality of the Information it has received under this Agreement shall continue for a period of three (3) years after such termination and then terminate, provided, however, that such obligation shall continue indefinitely as to Information constituting a trade secret under applicable law for so long as such Information remains a trade secret.

11. No Waiver. No failure or delay by OWNER is exercising any right, power or privilege hereunder shall operate as a waiver thereof, nor shall any single or partial exercise thereof preclude any other or further exercise thereof or the exercise of any other right, power or privilege hereunder.

12. Amendment. This Agreement may not be modified, supplemented or amended orally, but only by a writing signed by both parties hereto.

13. Applicability to Associated Parties. Any information disclosed to the Company by any of OWNER's affiliated companies or by any company, person or other entity participating with OWNER in any consortium, partnership, joint venture or

PRIVATE/PROPRIETARY/LOCK

Fig. 204

similar business combination in connection with the Project, which would otherwise constitute Information hereunder if disclosed by OWNER shall be deemed to constitute Information under this Agreement, and the rights of OWNER under this Agreement may be enforced by any such affiliate or other entity in addition to with respect to any violation relating to the Information disclosed by such affiliate or other entity, as if such entity were also a party to this Agreement.

14. Governing Law. This Agreement shall be governed by and construed and enforced in accordance with the laws of the State of _____, without regard to its choice of law provisions.

IN WITNESS WHEREOF, the parties have executed and delivered this Nondisclosure Agreement effective as of the date first written above.

OWNER:	Company:
By:_____	By:_____
Name:_____	Name:_____
Title:_____	Title:_____

PRIVATE/PROPRIETARY/LOCK

Fig. 205

205/223

Product Name

License Agreement Term Sheet

Definitions
What is licensed?

Specs of the Software (exhibit)
Definition/description?

Delivery, testing and acceptance
How should this work?

Grant and Scope of License
Exclusive? Non-exclusive? Etc.?

Term and Limitations on Use and reproduction
What can partnership do with it?

Sublicensing and transfer limitations

Pricing Terms
Royalties? Buy? Savings?

Acct and audit rights
As stated in the partnership agmt?

Sales and Property tax liability
Who liable?

Trade secret protection/Confidentiality terms
Need to be strict. In what manner may disclosure be made to vendors, particularly STB mfts?

Fig. 206

Title to original software and owner infringement reps
Positive stmt of ownership-will we indemnify the partnership?

Ownership of mods enhancement and additions
Who owns?

Source code inclusion/exclusion and protection
Must source be disclosed to partnership?

Training and documentation req's
Any?

Protection of Trademarks
Partnership must honor OWNER's marks

SW maintenance and technical support obligations

Vendor warranty obligations and scope

Limitation of liability and types of damages

Vendor indemnify and obligations in event of infringement

Dispute resolution provisions

Insurance terms (vendor on site?)

Assignment limitations

Std boilerplate (merger, written agmt, force majeur, etc)

Fig. 20I

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INTELLECTUAL PROPERTY OUTMARKETING
TRANSACTION REPORT

INTELLECTUAL PROPERTY INVOLVED:

OUTMARKETING PARTY:

BUSINESS DEAL CONTACTS:

INTELLECTUAL PROPERTY CONTACTS:

ESTIMATED VALUE:

Up Front Savings
Revenues (Years) =_____

I. Executive Summary

II. Background

Fig. 20B

III. Deal Structure

IV. Financial Analysis

V. Competitive Analysis

(1) Customers:

(2) Territory:

(3) Standardization:

Fig. 209

VI. Recommendation

	BUSINESS APPROVAL	LEGAL APPROVAL
Signature:	_____	_____
Printed Name:	_____	_____
Title:	_____	_____
Entity:	_____	_____
Date:	_____	_____

Fig. 21J

210/223

MS Project Activity Sheet

Project Name:_____

Project Start Date:_____

Project Resources:

Product Mgr._____ Contact Mgr._____

Mktg Analyst _____ Mktg/Sales Rep_____

Instructions:

1. All updates in MS Project are made t the sub-task level only.
2. In the Task # field, enter the # of the task being updated or "new" if adding a task.
3. Find the column for the field you wish to update for the task and enter update information in the space provided.
4. Use the following guidelines for updating fields in MS Project:
   - Start/Finish Date - Change the duration of the appropriate task(s) to arrive at the new start/finish date
   - % Complete - Enter the new % complete for the task(s), either manually or using the up/down arrows
   - Deliverable - Change deliverable field to Yes, either manually or using the option in the drop down box

Task#	Start Date	Finish Date	% Comp	Del	Add/Delete Task (incl. info for all project fields)

Fig. 211

Opportunity Score Card

Scoring Date:_____ Scorer Initials: _____ Total Score:

Product/Project Name_____

Business Unit _____

Business Unit Primary Contact:
Name_____
Phone_____

IPMARK Primary Contact:
Name_____
Phone_____

Score Card Key Factors	Scoring & Explanation
1. MARKET POTENTIAL -Product viability (i.e. unique product, benefits, support/maintanance?) -Potential customers? -Few competitive products/suppliers? -Large market, low market saturation? High Potential ——————— Low Potential 10 9 8 7 6 5 4 3 2 1	Market Potential Rating:
2. PROJECT TIMEFRAME -Product developed & ready to market? -Ownership? Patent status? -Identified interested parties? -Deal simple or complex? -Anticipated time to sell/close/recognize$? Today —6 —12 —18+ mths 10 9 8 7 6 5 4 3 2 1	Project Timeframe Rating:
3. PROJECTED REVENUE POTENTIAL -Anticipated total revenue from project? (if no strong customers, use 1X value) Over 5M—4M—1M———100K Under 10 9 8 7 6 5 4 3 2 1	Revenue Potential Rating:
4. COMPETITIVE THREAT TO BELLSOUTH -Sale give customer competitive advantage over BellSouth? No Threat ——————— High Threat 10 9 8 7 6 5 4 3 2 1	Competitive Threat Rating:
5. INTANGIBLE VALUE -Set stage for future big # deals? -Build/foster relationship w/existing/future customer? -Officer request/interest? -Public relations opportunity? High Profile ——————— Low Profile 10 9 8 7 6 5 4 3 2 1	Intangible Threat Rating:
	TOTAL SCORE:

Fig. 212

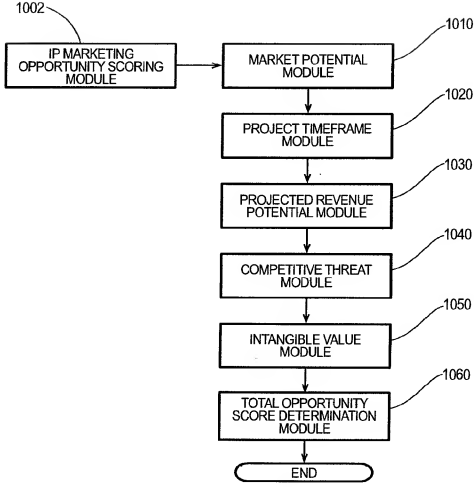
1002
IP MARKETING OPPORTUNITY SCORING MODULE
1010
MARKET POTENTIAL MODULE
1020
PROJECT TIMEFRAME MODULE
1030
PROJECTED REVENUE POTENTIAL MODULE
1040
COMPETITIVE THREAT MODULE
1050
INTANGIBLE VALUE MODULE
1060
TOTAL OPPORTUNITY SCORE DETERMINATION MODULE
END

Fig. 21J

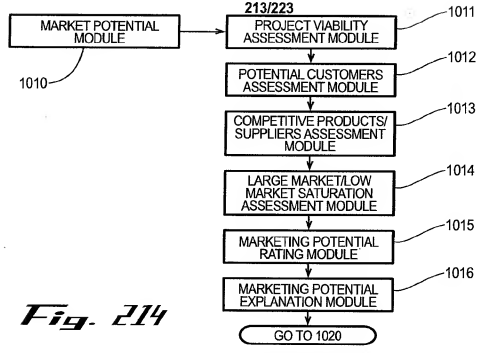

Fig. 214

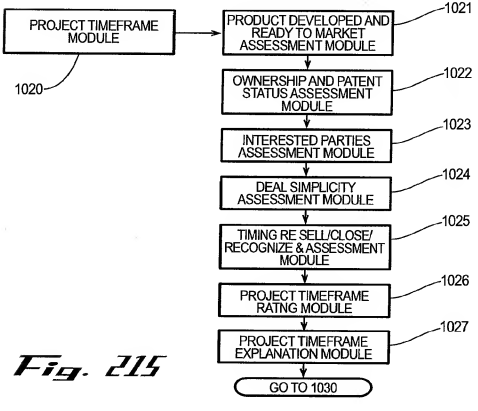

Fig. 215

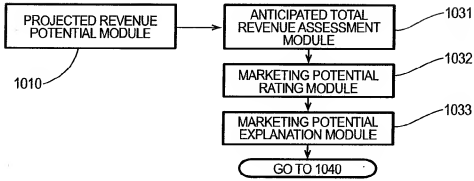

Fig. 216

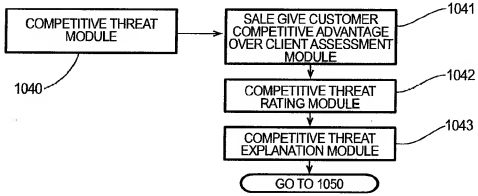

Fig. 217

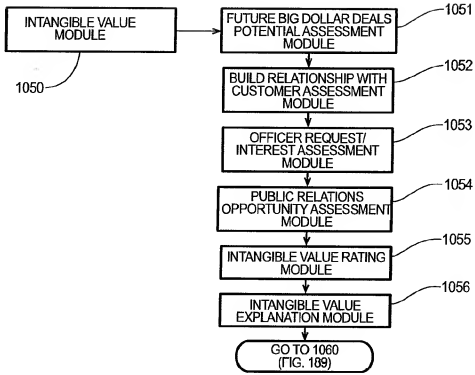
INTANGIBLE VALUE MODULE
1050
FUTURE BIG DOLLAR DEALS POTENTIAL ASSESSMENT MODULE
1051
BUILD RELATIONSHIP WITH CUSTOMER ASSESSMENT MODULE
1052
OFFICER REQUEST/ INTEREST ASSESSMENT MODULE
1053
PUBLIC RELATIONS OPPORTUNITY ASSESSMENT MODULE
1054
INTANGIBLE VALUE RATING MODULE
1055
INTANGIBLE VALUE EXPLANATION MODULE
1056
GO TO 1060 (FIG. 189)

Fig. 218

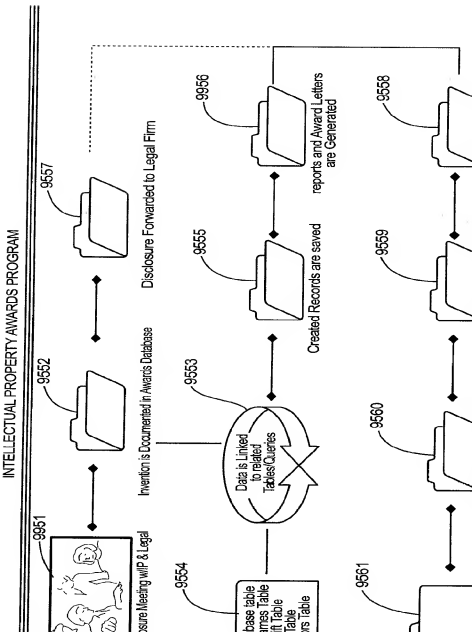
INTELLECTUAL PROPERTY AWARDS PROGRAM
9551
Vendor Disclosure Meeting w/IP & Legal
9552
Invention is Documented in Awards Database
9557
Disclosure Forwarded to Legal Firm
9554
IP Awards Database table
Organization Names Table
Disclosure gift Table
Inventors table
IP Coordinators table
9553
Data is Linked to related Tables/Queries
9555
Created Records are saved
9556
reports and Award Letters are Generated
9561
IP right record is Added to Database
9560
Legal Firm Notifies IP of Issuance and Award is Processed
9559
Legal Firm Notifies IP of Filing and Award is Processed
9558
Disclosure Award is Sent to Inventor

Fig. 21J

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Company Intellectual Property
10 Step Checklist

✓**Patents**

- ☐ Work produced by Company employees or with Company resources has been assessed for patentability if, at least one of the following occurred:
  - ⇨ Development of a new product, feature, process or software that seems unique
  - ⇨ Improvements to existing technology, product, process, or software
  - ⇨ Results that cut cuss and/or improve efficiency
  - ⇨ Creation of a new business method

It is critical that employees bring their inventions to the attention of the Director of Technology (404 xxx-xxxx or the Technology Asset Manager (404) xxx-xxxx as soon as possible, and especially before any public disclosure of the invention!

✓**Trademarks**

- ☐ The Company mark and subbrands have been used in accordance with the company's graphics standards to ensure that the significant value of the mark is not diluted.
- ☐ All subbrands have been cleared by the Director of Trademarks.
- ☐ All third party(such as agents, distributors, co-brand parties, and sponsored parties) use of Company's trademarks have been authorized in writing using language approved by Company Intellectual Property Marketing Corp.

Any questions regarding Graphics and Sponsorships should be brought to the attention of the Director of Corporate Identity (404) xxx-xxxx and other Trademark questions should be directed to the Director of Trademarks (4040 xxx-xxxx.

✓**Copyrights**

- ☐ Every Company work product created by an employee or by a vendor under a "work made for hire" contact have been properly marked with a copyright notice.

It is not necessary to register the copyright in order to place the copyright notice on the work.

Any questions regarding Copyrights should be brought to the attention of the Director of administration (404) xxx-xxxx.

✓**Proprietary Information**

- ☐ All proprietary information has been physically marked by its originator at the bottom center margin using the approved markings.
- ☐ All proprietary information has been securely stored and properly disposed.
- ☐ An NDA or IEA has been executed due to the necessity of sharing Company proprietary information in order to discuss or negotiate a potential business relationship, and:
  - ⇨ only the minimum amount of proprietary information necessary to facilitate our business purposes has been shared or received; and
  - ⇨ any necessary patent applications have been filed prior to such disclosures.

Any questions regarding proprietary information should be brought to the attention of the Director of Administration (404) xxx-xxxx.

✓**Ownership**

- ☐ Before any development work to be done by an outside vendor (such as software, training courses of advertising) is begun, a specific written contract has been executed ensuring that Company will be the owner of the intellectual property rights in the developed technology, or work of authorship. (see Executive Directive 12).

Any questions regarding Ownership should be brought to the attention of the Vice President of Company Intellectual Property Management Corporation (404) xxx-xxxx.

✓**Marketing**

Company's policy is to maximize the value from its intellectual property.

- ☐ Opportunities to outmarket Company technology, software, systems, processes or other intellectual property to another company have been identified.

Any marketing opportunities should be brought to the attention of the Vice President of Company Intellectual Property Marketing Corporation (404) xxx-xxxx.

Fig. 220

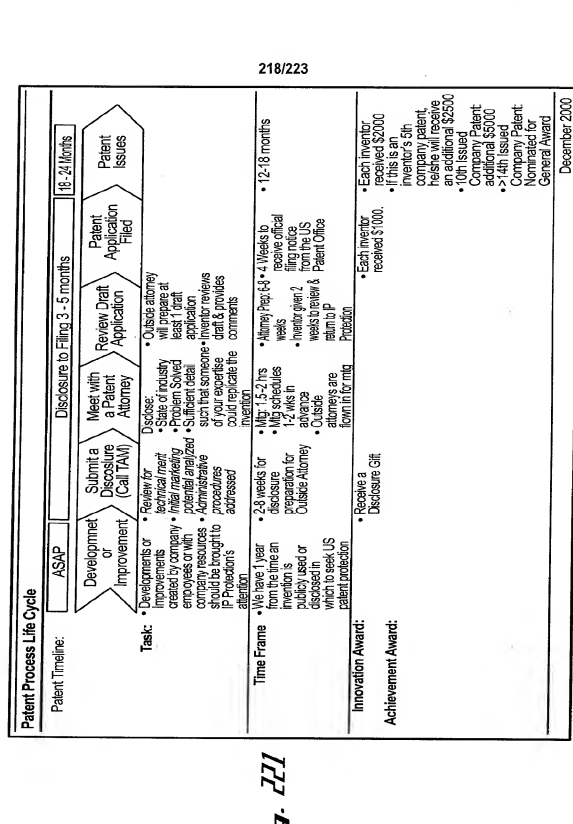
Patent Process Life Cycle
Patent Timeline:
ASAP
Disclosure to Filing 3 - 5 months
18- 24 Months
Development or Improvement
Submit a Disclosure (Call TAM)
Meet with a Patent Attorney
Review Draft Application
Patent Application Filed
Patent Issues
Task:
• Developments or improvements created by company employees or with company resources should be brought to IP Protection's attention
• Review for technical merit • Initial marketing potential analyzed • Administrative procedures addressed
Disclose: • State of industry • Problem Solved • Sufficient detail such that someone of your expertise could replicate the invention
• Outside attorney will prepare at least 1 draft application • Inventor reviews draft & provides comments
Time Frame
• We have 1 year from the time an invention is publicly used or discussed in which to seek US patent protection
• 2-8 weeks for disclosure preparation for Outside Attorney
• Mtg: 1.5-2 hrs • Mtg schedules 1-2 wks in advance • Outside attorneys are flown in for mtg
• Attorney Prep: 2-4 • 4 Weeks to receive official filing notice from the US Patent Office • Inventor given 2 weeks to review & return to IP Protection
• 12-18 months
Innovation Award:
• Each inventor received $1000.
• Each inventor received $2000
• If this is an inventor's 5th company patent, he/she will receive an additional $2500
• 10th Issued Company Patent additional $5000
• >14th issued Company Patent: Nominated for General Award
Achievement Award:
• Receive a Disclosure Gift
December 2000

Fig. 221

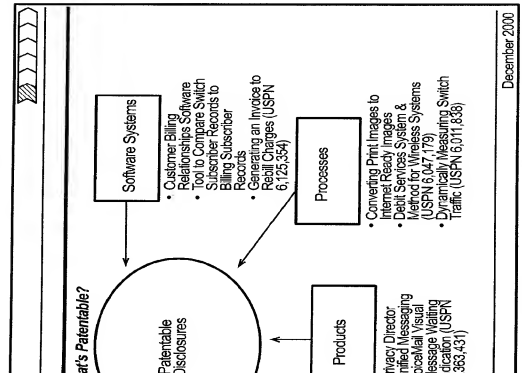
POTENTIAL OPPORTUNITY ASSESSMENT
Innovations
Business Methods
• Reverse Auction Process for non-commodity Items
• Internal Audit Support System
• Collective Bargaining Process
What's Patentable?
Patentable Disclosures
Software Systems
• Customer Billing Relationships Software Tool to Compare Switch Subscriber Records to Billing Subscriber Records
• Generating an Invoice to Retail Charges (USPN 6,125,354)
Processes
• Converting Print Images to Internet Ready Images
• Debit Services System & Method for Wireless Systems (USPN 6,047,179)
• Dynamically Measuring Switch Traffic (USPN 6,011,838)
Products
• Privacy Director
• Unified Messaging
• VoiceMail Visual Message Waiting Indication (USPN 5,363,431)
Hardware Functionality
• Portable Radiotelephone sSliding Cover (USPN 6,073,027)
• Coin Deflector for a Coin Receptacle (USPN 5,742,415)
• Subscriber Cell Phone Activation (USPN 5,812,953)
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Fig. 22

Internal Auditor
Inventor
• Identify innovations within your organization:
– Developed or improved a process or service?
– Created a method of doing business?
– Improved efficiency or cut costs?
• Innovation:
– Developments or improvements by you, the employee or
– Developments or improvements created with resources
IP Ambassador
• Raising Awareness of Intellectual Property:
– Assist in the education of employees
– Identify intellectual property risks to business objectives
– Identify intellectual property controls to those risks
– Where appropriate, suggest IP inclusion to organizations modifying their business process.
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Fig. 223

Internal Audit & the Checklist
Sample Business Process
Business Objectives
Transition Product to Trial Testing
Integrate Product w/ Current Service Offerings
Product to Market by Goal
Product Savings
Decrease employee turnover ratio
Potential Risks
• Delay in contract negotiations
• Vendor's architecture incompatible
• Contract Disputes
• Project delayed by missed deadlines
• Unable to market product as intended due to Trademark Issues
• Increased developmental costs
• Product released to <50% of Market in 2001
• Costly Overhead
• Employee Incentive Programs too costly
• Access to Senior Mgt too bureaucratic
• Limited Budget for Salary Increases
Controls
• Seek Patent Protection early
• Ensure proprietary info properly marked
• Ensure Ownership
• Seek Patent Protection
• Ensure Proprietary Markings
• Contact Trademark & Corporate Identity Directors early in Process
• Identify outmarket opportunities
• Encourage innovation through the Innovation Awards Program
As an internal auditor, you can help educate the organization on the importance of intellectual property.
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Fig. 224

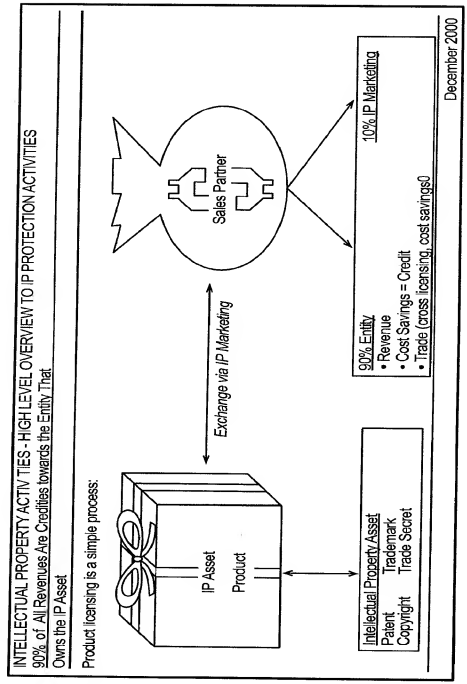
INTELLECTUAL PROPERTY ACTIVITIES - HIGH LEVEL OVERVIEW TO IP PROTECTION ACTIVITIES
90% of All Revenues Are Credities towards the Entity That
Owns the IP Asset
Product licensing is a simple process:
IP Asset
Product
Exchange via IP Marketing
Sales Partner
Intellectual Property Asset
Patent
Trademark
Copyright
Trade Secret
90% Entity
• Revenue
• Cost Savings = Credit
• Trade (cross licensing, cost savings0
10% IP Marketing
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Fig. 225

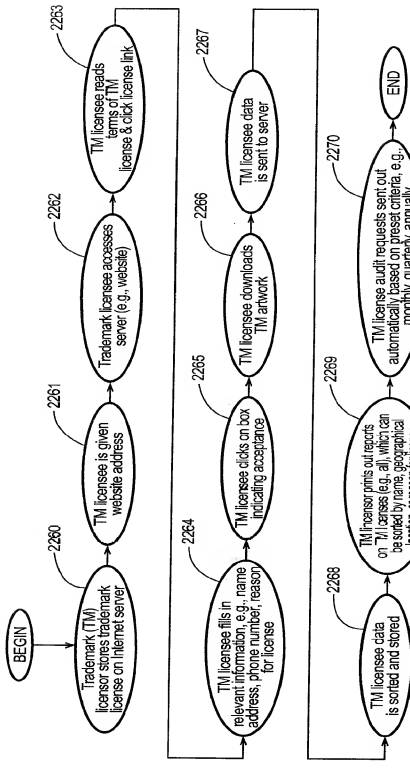
BEGIN
2260
Trademark (TM) licensor stores trademark license on Internet server
2261
TM licensee is given website address
2262
Trademark licensee accesses server (e.g., website)
2263
TM licensee reads terms of TM license & click license link
2264
TM licensee fills in relevant information, e.g., name address, phone number, reason for license
2265
TM licensee clicks on box indicating acceptance
2266
TM licensee downloads TM artwork
2267
TM licensee data is sent to server
2268
TM licensee data is sorted and stored
2269
TM licensor prints out reports on TM licenses (e.g., all, which can be sorted by name, geographical location, or reason for license
2270
TM license audit requests sent out automatically based on preset criteria, e.g., monthly, quarterly, annually
END

Fig. 22G